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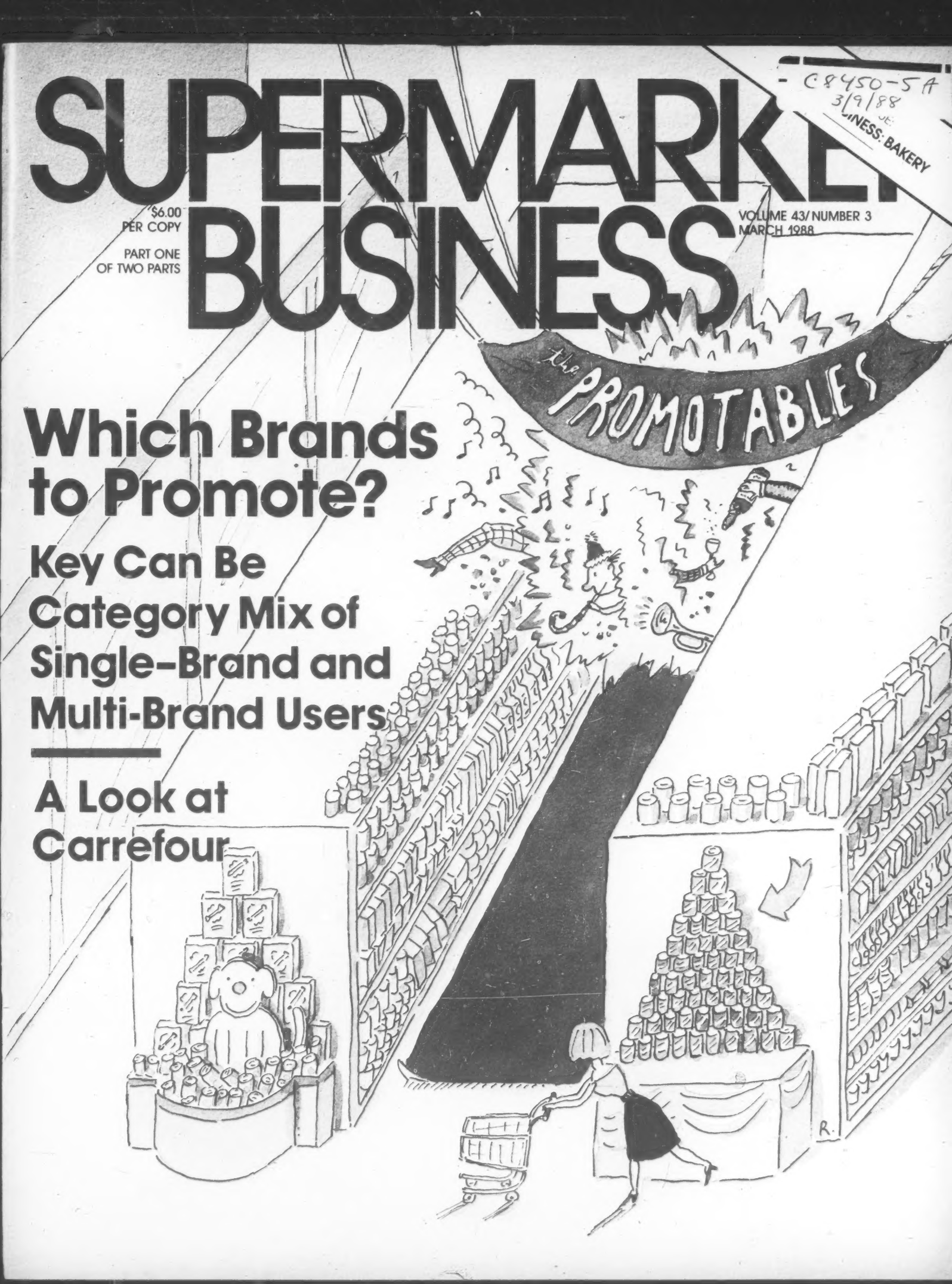
PART ONE
OF TWO PARTS

VOLUME 43/NUMBER 3
MARCH 1988

Which Brands to Promote?

Key Can Be Category Mix of Single-Brand and Multi-Brand Users

A Look at Carrefour



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SUPERMARKET BUSINESS

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CARREFOUR ROLLS INTO TOWN, BUT IS PHILADELPHIA READY FOR THE FRENCH BEHEMOTH?/BOB HUGHES 17

Carrefour hopes that its strong perishables and sturdy, if deliberately limited, selection of nonfoods, will be the key to success.

CONSUMERS GET FRESH WITH LOCAL PRODUCE 23
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Retailers are finding that they often don't have to look farther than their own backyards for fruits and vegetables that will appeal to even the most discerning.

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Carrefour's new Philadelphia hypermarket has an array of hyperactive service sections, but its bakery is on a somewhat slower track than the rest of the store.

IN HACKETTSTOWN, NEW JERSEY, SHOPRITE CREATES A NONFOODS HAVEN/DANIEL ELMAN 85

In this ShopRite's new design, the nonfoods section is a virtual store within a store. But nonfoods also show up in some unlikely places around the store.

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CHECKOUT: IT DOES EVERYTHING BUT COOK THE MEAL 124
DANIEL ELMAN

Cuisine Screen, a touch-screen video unit, gives shoppers 100 cooking demonstrations at their fingertips. It's not cheap, but it's a proven traffic puller.

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TRADESCAN

SB CONTEST WINNERS HAVE LUGGAGE, WILL TRAVEL

One glance at an industry events calendar will show that folks in the supermarket business are a peripatetic lot. Every month there are several far-flung conferences, conventions and seminars going on. So it wasn't surprising that January's four winners, who picked up six-piece Sir Bentley luggage sets, are all planning business or vacation travel sometime soon.

Winn-Dixie Greenville location manager Bob Mull is planning to attend a convention in New Orleans in May. Mull says he's been entering the contest "off and on since you started it. Maybe I've missed it two or three times all together." In addition to the contest, he says he enjoys keeping up with what stores in other market areas have been doing.

Sherry Hignite, a retail service administrator, has been with Laurel Grocery Company for two years. Her reaction to her contest win was, "I'm shocked, I've never won anything in my life." She says she enjoys the magazine's store features, Tradescan and New Products. She'll be off to a convention in Las Vegas in the near future.

Harry R. Cobasky, a store director with Arizona's Bashas' Markets, hadn't planned on winning the contest; he just hoped that his company's name would find a place on the list of winning entries. He not only succeeded in his goal, but will also have new luggage for his family's upcoming vacation to Yellowstone and the Grand Tetons.

Though Phyllis Beck, store accountant with Harris Teeter Supermarkets in Litchfield, S.C. has been reading the magazine for a year, she did not enter the contest until January, because "I thought only store managers were eligible." As it turned out, her first entry was a winner. She also has a vacation trip coming up later this year.

Those who take time out to try April's contest might pick up something to help them keep better track of time. Two winners will receive a man's or a lady's watch. April's contest is on page 123, following January's correct entries beginning on page 117.

ROTH YOUNG 1988 U.S. FOOD INDUSTRY SALARY OUTLOOK

SELECT JOB TITLES Supermarket	PROJECTED U.S. 1988 MEDIAN SALARIES (& Projected Low-High Range)	
President	$187,000	($85-$351,000+)
V.P. Division Manager	$ 95,500	($65-$170,000)
V.P. Director of Store Operations	$ 85,800	($55-$155,000)
Advertising Manager	$ 61,100	($35-$ 89,000)
Controller	$ 52,300	($39-$ 75,000)
District Manager	$ 57,200	($39-$ 85,000)
Training Director	$ 49,900	($37-$ 62,000)
Store Manager	$ 48,400	($33-$ 68,000)
Meat Merchandiser	$ 46,400	($35-$ 67,000)
Meat Buyer	$ 42,700	($30-$ 57,000)
Grocery Buyer	$ 42,300	($30-$ 58,000)
Bakery/Deli Buyer	$ 41,200	($30-$ 57,000)
Dairy Buyer	$ 36,200	($25-$ 51,000)

The highest-paid supermarket chain president in the U.S. will make more than $351,000 in 1988 ... while the lowest-paid will make $85,000.

That's according to a new study released by Roth Young Personnel Service. The median 1988 salary for a supermarket president is $187,000, the study reports (see chart).

The study was based on more than 850 requests for job candidates filed in Roth Young Personnel Service's 33 offices around the country.

Who will get a decent raise in 1988? Specialists working in service departments and managers of super stores, says Roth Young. If you're in this group, you can expect a pay raise of 10 percent or better.

If you aren't in this group, all is not lost— other supermarket workers can expect pay raises of four to seven percent.

But don't take it personally if you don't get the raise you think you deserve—tougher competition for the nation's food dollar and tighter profit margins are shrinking the pay-raise pool, the Roth Young study reports.

NO FRILLS: THE THRILL IS GONE

Generic labels accounted for only 1.2 percent of retail dollars in food stores, according to SAMI/Burke Inc., the market research company which tracks over 470 grocery product categories.

This represents half the share that the products in the plain wrappers held at their peak in 1982 and a decline in annual sales level of $348 million dollars compared with the equivalent period in 1986.

One reason suggested for the decline was a drop in the number of food store chain and wholesaler warehouses distributing no-frills items. For example, in the 54 major markets monitored by SAMI, as many as 52 fewer warehouses were shipping generic light-duty detergents in 1987, as compared with the previous year.

Another reason for the fall-off, noted SAMI/Burke Senior Vice President Robert McCann, is the easing of inflation since the generics' early '80s heyday. "Now that the economy is generally healthy, some of the focus has shifted from low-price store brands to price-off coupons offered by advertised brands."

WHAT'S BLACK AND WHITE AND RECYCLED AT RALPHS?

At Ralphs (Compton, Calif.), you can now make money by saving trees.

The Southern California chain has added newspaper recycling to its present bottle and can recycling programs.

Customers can bring bundles of newspapers to the special recycling centers at 73 Ralphs and The Giant stores, and receive cash for their contribution.

Most of the centers are open 30 hours each week, Tuesday through Saturday.

NEW YORK TO EXPAND 'SEAL OF QUALITY' PROGRAM

New York State's three-year-old "Seal of Quality" program is set to be expanded from apples, potatoes, onions and eggs to five or six other categories ... including dairy, processed foods and summer vegetables.

The "Seal of Quality" program consists of state inspections of shipments to New York supermarkets. It was begun to encourage local packers to put more effort into improving the quality of New York State's food products.

The program was prompted by consumer research revealing that many New York shoppers refused to buy locally grown commodities.

The "Seal of Quality" program's goal has been "to bring more packers up to a good level," says David Austin, chief marketing representative for the New York State Department of Agriculture and Markets.

A supermarket advisory committee, comprised of major New York State retailers, aids the Department in setting the program's quality standards. It also advises on advertising/promotional strategies to support the "Seal of Quality" program.

This year, advertising has been stepped up; and "commodity characters," pictured above, who will make personal appearances at supermarkets around the state, have been introduced.

LETTERS: ON WHENEVER'S CLEAR ADVANTAGE

We appreciate your recent coverage of Marcal's entry into the feminine hygiene category in the "On Marketing" section of the January 1988 issue of SUPERMARKET BUSINESS.

We would, however, like to correct the statement that the Whenever "line will take on a low-priced, brand quality position, which is the basic marketing strategy for Marcal paper products."

Unlike the Marcal paper products, which have a value positioning, new Whenever Thin maxi-pads and panty shields are positioned and priced as premium feminine hygiene products. They are a technologically advanced line of products competing in the growing "thins" segment of the market against other major premium brands.

The Whenever products combine a high level of performance with innovative packaging. Whenever led the category in the introduction of individually wrapped products in polybags instead of cartons. It remains the only product line packaged in a clear polybag. The clear outer bag provides outstanding shelf visibility and showcases Whenever's feminine colors and contemporary cosmetic design.

—Anne C. Chase
Director of Marketing
Marcal Paper Mills
Elmwood Park, N.J.

WASHINGTON BRIEF

JOHN BASKIN

Commerce Department Forecasts Uneven Growth in Retail Food Sales: Gains for Chains Seen

Retail food stores will lose more and more of their share of the U.S. food dollar to restaurants during the next five years, according to predictions of U.S. Commerce Department economists.

"A slowly growing U.S. population, changing demographics and growing competition from the away-from-home food sector will pose significant problems for the food retailing industry," the economists said. In particular, they warned that grocers will probably face profit difficulties "and are expected to engage in spirited—and potentially costly—competition."

Short-range prospects, however, are more favorable. According to forecasters, food store retailers will increase sales five percent this year reaching $323 billion. Chain supermarkets will be the biggest gainers, with sales predicted to rise 5.4 to $178 billion.

Grocers are already looking for ways to improve their percentages against dining out spending, emphasizing retail store carry-outs and microwave meals. Even so, during the first six months of 1987, real consumer spending for foods and beverages to be eaten at home declined 2.9 percent, while spending in food-service outlets was up almost 4.7 percent.

Government economists estimated, however, that final totals for 1987 would show some growth in spending for "at-home" food (an estimated 1.7 percent) to $339 billion.

According to the Commerce Department, the growth was spread unevenly among the various food sectors. For example, shipments of red meat experienced a modest decline, while poultry consumption continued to climb. Moreover, the pattern is predicted to continue over the next five years.

"The rate of increase in poultry industry shipments will continue to outpace that of the red meat industry, but at a lesser rate than in the past," forecasters said. "Even so, poultry per capita consumption, as a percent of total meat consumption, will increase from 36 percent in 1987 to almost 40 percent by 1992."

TRENDS AND FORECASTS: FOOD RETAILING
(in millions of dollars except where noted)

SALES	INDUSTRY DATA 1985	1986	1987[1]	1988[2]	PERCENT CHANGE 1985-86	1986-87[1]	1987-88[2]
All-food grocery stores	283,987	296,040	307,586	322,965	4.2	3.9	5.0
Chainstore groups[3]	158,217	164,634	171,549	180,298	4.1	4.2	5.1
Grocery stores	267,004	278,483	290,458	305,656	4.3	4.1	5.2
Chainstore groups[3]	155,649	161,812	168,770	177,884	4.0	4.3	5.4
Retail Bakeries	4,240	4,802	5,229	5,360	13.3	8.9	2.5
Other food grocery stores	12,743	12,755	11,899	11,949	0.1	−6.7	0.4

Source: U.S. Department of Commerce: Bureau of Census, Bureau of Economic Analysis, International Trade Administration [1] Estimate [2] Forecast [3] Companies which had 11 or more retail establishments.

During the same period, government experts expect a rise of up to 3.8 percent in shipments of processed fruit, vegetables and specialty items.

"The primary stimulus for new products in this sector is the microwave oven," explained researchers. They predicted that the percentage of American households with a microwave will increase from 60 percent in 1987 to 75 percent this year. One reason for the skyrocketing demand for microwaves: the growing number of one- and two-person households demanding "quick and easy-to-prepare" meals. According to the Commerce Department, one- and two-person homes will increase six percent to 60 percent by 1992. In addition, forecasters indicate that two-thirds of all women will be in the workforce by that time.

Dairy prospects are good

Based on the government findings, U.S. grocers will also sell lots of butter and other dairy products in coming years. Projections for 1988 show a "real" inflation-adjusted gain in butter shipments of 4.4 percent. Moreover, butter consumption may go even higher if consumers accept a new butter with half the calories of the traditional product which is being test marketed by the California Milk Advisory Board.

According to forecasters, long-term performance by the dairy industry will continue to improve, spurred by sales of premium ice cream that will allow the frozen dessert industry "to sprint ahead."

The increasing popularity of ice cream is expected to take its toll on candy and confectionery sales in the future.

"Over the next five years, because of shifting demographics and increased competition from other products, such as ice cream and snack foods, candy consumption is not likely to increase as much annually as has been the case," economists said. They predicted an inflation-adjusted increase of about 1 percent per year through 1992.

IBWA Urges New Water Bottling Rules

Proposing stricter regulations for the bottled water industry, the International Bottled Water Association (IBWA) called for new rules prohibiting the use of milk bottling equipment to bottle water.

In a petition to the Food and Drug Administration (FDA), IBWA said that the trend toward the use of milk bottling equipment in water bottling has become a major concern within the industry because of possible microbiological contamination from the practice. The association urged FDA to adopt a "dedicated equipment" regulation within its existing standards, which would prohibit the "unsound practice" of using milk bottling equipment to bottle water.

IBWA said that an outbreak of microbiological-related illness has already occurred in Texas, and "the desired health-protection effect is for water bottling equipment to be used for bottling only water as a means of preventing" this microbiological contamination.

The association's proposal includes all of the public health objectives set forth by Congress in the 1986 Federal Safe Drinking Water Act amendments, and according to IBWA, "helps protect the consumers' interest by expanding regulations to cover all types of bottled water products, including mineral water."

Other provisions in the association's proposal include facility inspections and labeling requirements for the bottled water industry.

To assure compliance with "good manufacturing procedures" and FDA bottled water safety standards, IBWA called "for mandatory annual inspections of all bottling facilities."

FTC Lifts Albertson's Ban

Chain is free to acquire other Calif. stores.

The Federal Trade Commission (FTC) set aside a 1981 order limiting the right of Albertson's, Inc., to acquire other retail grocery stores.

The order, which was scheduled to stay in effect until 1991, barred the Boise, Idaho, chain's California division from acquiring five or more stores within a 15-state area without prior FTC approval. The restrictions resulted from a 1978 complaint that Albertson's takeover of Fazio's, the California Division of Fisher Foods, Inc., was anticompetitive.

According to the Commission, the reversal reflects the FTC conclusion that "there no longer appears to be a trend toward concentration in the relevant market." Reviewing Albertson's request to set aside the order, antitrusters decided that it was "in the public interest" to set aside the order.

House to Consider Wage Subsidies

Legislation has been introduced in the House to rejuvenate the Targeted Jobs Tax Credit (TJTC) program of wage subsidies to employers of disadvantaged workers.

Currently, grocers and other employers may qualify for Federal tax credits of up to 40 percent of the first $6,000 in wages paid to a newly-hired welfare recipient or other "economically disadvantaged" workers.

These credits, which have been used extensively by supermarket chains and other retailers to reduce payroll costs. are scheduled to expire at the end of this year. The new legislation, introduced by Rep. Charles Rangel (D-N.Y.) would extend the TJTC program through 1991.

THE PROMOTABLES

Some brand-name users would rather fight than switch, but in many categories, users tend toward multiple brands. This study measures the strength between brands and users by category.

PREPARED BY ROBERT DIETRICH

In the world of packaged goods marketing, many believe the balance of power has been slowly shifting from consumer advertising (which pulls goods out of the supermarket) to manufacturer-sponsored promotion (which pushes goods out of the supermarket).

Fixated on the great green tide of promotional funds that manufacturers and processors are channeling their way, warehouse and store operators may inadvertently be devoting an ever smaller share of their efforts to their shoppers. Quite understandable, when they can realize a faster and easier payout by selling to their suppliers.

Selling to their suppliers? Yes, selling their weekly ad space, selling their end aisles and even, through slotting allotments, selling their shelf space before authorizing room there for new items.

On the plus side, this trend often gives shoppers the opportunity to purchase products they intended to buy (or were at least receptive to try) anyway, but at a cheaper-than-normal price.

But there's a downside for the shopper too, to the degree that "bad" goods push out the "good." Not bad in quality, of course, but simply brands the shopper will not consider substituting for a favorite brand, even at a considerable savings.

One or many

The probability of price-driven promotions succeeding is related, as the numbers in this study demonstrate, to a simple but often overlooked factor: the relative incidence of two groups:

☐ **Multi-brand users.** These are people who regard the category as a commodity within which one brand is as good as any other. Price incentives wash them from one brand to the next.

☐ **One-brand users.** By definition, these loyalists know what they like, shop for what they like and find and buy what they like. Or else.

For the first time, this study reveals the dimension of the vast range represented by these groups by product category. For some categories the proportion of multi-brand users among the user population may climb to over half—even up to almost 80 percent in the case of cold breakfast cereals.

Categories that cluster at the high end of the range with an above average (greater than 30 percent) proportion of multi-brand users are designated in this report as "promotables." Brands in promotable categories are welcomed warmly by shoppers when they appear in a weekly store ad or piled high on an end-aisle display. These categories tend to be extremely price-sensitive, so canny promotion can literally move boxcars of product.

In contrast, many product categories have only a relative handful of multi-brand users, often users so loyal to one brand that they'd rather take flight (to another store) than switch (brands). We designate such categories "dependables" because they are made up of brands that have established a unique brand franchise with shoppers and can therefore be depended on to sell consistently. They don't need frenzied deep-price-cut specials to move them. They're always moving because their loyalists are always looking for them.

Unlike the promotables, the dependables do not require or greatly benefit from coveted end-aisle exposure. What dependables do need is the assurance of adequate shelf space and protection from out-of-stocks. In return, these products provide both satisfied shoppers who can find what they're looking for and a pool of brands that sell every day and do so at everyday prices.

(Note: Several tables in this report show rankings of product categories that reflect their relative promotability. The large table ("Ranking of Multi-Brand Users," page 34) ranks 192

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dry grocery, frozen and dairy category products used by female homemakers. A second table ranks 36 candy, tobacco, soft drink and beer products used by adults.

Counting by category

The inter-relationship between brand loyalty and promotability potential has, of course, long been recognized. The purpose of this report is to document it on a category-by-category basis to help readers formulate their merchandising strategies more profitably.

Formulating the data in this unprecedented way was made possible by exclusive access to the databank of Mediamark Research Inc. This SUPERMARKET BUSINESS study is based on custom-designed tabulations from MRI's database of over 20,000 consumers projected to the total U.S. population.

Demographics count

Distinguishing between promotable and dependable product categories can provide a big boost to the payout from instore promotion resources. Even greater insight and efficiency can be derived from a study of how demographics affect the incidence of multi-brand purchase by product category.

To that end, the detailed tables that comprise the bulk of this report show not only the overall incidence of multi-brand users by product category, but how—by seven demographic characteristics, including region, age and income—subgroups vary from the norm.

This is concrete, usable information that you can match to the demographic mix of your store's customer base. For example, higher-income users show an above-average propensity toward multi-brand usage of instant coffee, but the same higher-income users are reluctant to use more than one brand of ketchup or oven cleaner. Stores with an above-average proportion of such customers should adjust their merchandising weights accordingly.

This study does not purport to be a handbook from which definitive plans can be made on which categories to promote. But it can be a valuable guide for decision-making in that area based on proven patterns of consumer behavior.

SOME DEFINITIONS

Product usage: For each product category, the questionnaire defines the time period that is relevant. Usage may cover as little as the most recent seven days for a high-frequency product, or as much as six months or a year, for low-frequency products.

Heavy usage: For each product category, users are arrayed into heavy, medium and light users, according to the frequency with which they used the product in the relevant period. While accounting for a minority of users, heavy users usually account for a majority of product "tonnage."

Multi-brand user: A user who reports using more than one brand of the category in the reporting period.

One-brand user: A user who reports using only one brand of the category in the reporting period.

Adults: Age 18 and over. Adults comprise the base for products purchased for personal use by both men and women.

Men/Women: Age 18 and over. Used as the base primarily for health and beauty aids products used by only one sex.

Female homemakers: The homemaker is the person designated as the one who does most of the shopping for groceries and household items. Products purchased for the household are based on female homemakers. (Mediamark also collects data on usage by male homemakers.)

WHERE THE NUMBERS COME FROM

The formulation of effective marketing, advertising and media decisions is dependent on access to data about consumers on a product-by-product basis. The source of such data is frequently the same as the source for the statistics in this study—Mediamark Research Inc. (MRI), New York.

The Mediamark sample, whose respondents participate in both personal and self-administered surveys, consists of over 20,000 individuals per year. Data are gathered on over 450 product and service categories, 1900 product types and 5700 individual brands.

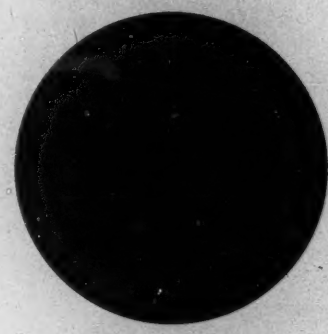
The statistics presented in this study are not published as part of the standard Mediamark survey, but were tabulated specially for SUPERMARKET BUSINESS. While MRI subscribers most often use the data as input for marketing decisions involving brands for which they are responsible, the database has obvious potential for making decisions right down to the supermarket aisle level.

"Ranking multi-brand users the way this report does, and then cross-ruffing it by demographics to see what it means at the store level is something new," says Sylvia Cassel, senior vice president of administration for Mediamark, "but it's hardly surprising. Our subscribers are always finding new ways to interrelate our data to help solve marketing problems."

To help encourage further investigation of the problem-solving potential of the Mediamark database, MRI has recently published "Winning the Marketing Game," which describes how interrelating data on product category and brand usage with data on media habits can impart a competitive edge to marketing strategists.

To obtain a copy of "Winning the Marketing Game," or to find out more about the categories mentioned in this report, or about Mediamark services in general, contact Sylvia Cassel, senior vice president, administration, Mediamark Research Inc., 341 Madison Ave., New York, N.Y. 10017. (Tel.: (212) 599-0444)

HOW TO TARGET ... FOR PROMOTABLES



Product categories with a high incidence of MULTI-BRAND USERS provide the potential for aggressive pricing and merchandising policies to pay off, in a climate of below-average brand loyalty.

Many experiments have been conducted to evaluate the weight that various controllable factors bring to bear on the relative success of instore merchandising efforts.

Signs? Size of display? Location in traffic flow? Ad tie-in? Coupon tie-in? End-aisle versus on-shelf? What role does each play in partnership with that most pivotal factor—price?

Another, somewhat obvious, factor makes a significant contribution to the promotability of a product, as the figures for this study suggest. And that's simply the incidence of multi-brand usage for a given product category.

In categories where multi-brand usage is high, brand loyalty is, as logic dictates, low. Therefore, consumers are more responsive to promotions for brands other than the one they customarily buy or use. So we tag such categories as "promotables."

The table showing how 193 categories rank in multi-brand usage (see "Ranking of Multi-Brand Users—Female Homemakers") is headed by cold breakfast cereals. Over 78 percent of female homemakers said their household consumed more than one brand in a recent survey period. (Among heavy users, that most coveted group of consumers who traditionally count for the majority of product tonnage, an even higher 94.1

YOUR STORE'S MERCHANDISING STRATEGY ...

percent report multiple brand usage.)

A quick scan of the product categories near the top of the list, suggests that every aisle of dry grocery contributes its share of promotables. So, too, do the frozens and dairy cases.

Opening the cupboards of many households would reveal a multi-brand choice among such heavily merchandised product categories as cookies, crackers, laundry detergents, salad dressings, dry cake mixes and packaged dinner mixes.

None of these categories is neglected in the merchandising and advertising programs of most retailers, fueled as they are by a constant stream of incentives both to stores (in the form of merchandising allowances) and to consumers (in the form of cents-off coupons).

Considering just the top third of the list, merchandising management might glean some comparatively overlooked opportunities in categories where consumers are receptive to alternative-brand purchases but are rarely confronted with merchandising incentives.

Categories ranging from dog biscuits and treats to disposable diapers to household cleaners are all prominent promotables that might be worked into the merchandising rotation more frequently to customer approval. Frozens are a particularly ripe segment, with, for example, 47.9 percent of users of frozen main courses and 68.3 percent of heavy users reporting multiple brand usage.

A second table ranks multiple brand usage of dry grocery products by adults (see "Ranking of Multi-Brand Users—Adults"). Such high tonnage categories as beer and soft drinks share the top of the promotability list with candy bars and wine coolers. But no tobacco products exhibit above-average promotability in supermarkets.

The simple story these lists tell is that the payout on scarce and valuable merchandising space, either in a store or in an advertisement, can be maximized by assigning it to products in categories where users show the highest willingness to react— that is, buy—when confronted with effective merchandising.

Promoting the promotables will pay off.

...FOR DEPENDABLES

Categories whose constituency is defined by high incidence of ONE-BRAND USERS (i.e. few MULTI-BRAND USERS) demand rigid stocking policies to assure that the brand-loyal stay store-loyal as well.

The universal credo of the price-conscious, bargain-hungry shopper is assumed to be, "I buy what's on sale." But it's not always so. And retailers who assume that may be misallocating precious merchandising resources.

Brand loyalty still lives, as evinced by the low incidence of multi-brand usage for several dozen product categories. The table ranking propensity of homemaker-users to use more than one brand shows several dozen categories in which fewer than 20 percent buy more than one brand.

Flipping the coin, that means that for these categories, 80 percent of consumer-users are relatively unlikely to buy other than their regular brand no matter how high the end aisle display is stocked with another brand. Such categories are made up of brands whose proven franchise is protected by the consumer brand-bond of loyalty. In contrast to the promotables, we call them the "dependables."

For some dependable categories, the leading brand or brands may virtually "own" the category; some invented the category and are so associated with it that in the consumer's mind, substitution is virtually unthinkable. Some examples might include canned stew, waxed paper, baby shampoo, baking coconut, cream cheese, English muffins and disposable cups.

Looking at the ranking of multi-brand usage on the table for adult users of dry grocery products reveals that relatively few consumers will stray from their favorite brand of cigarettes, hard roll candy, vermouth or malt liquor.

Because consumers of these products are reluctant to switch products or sample other brands, does this mean dependables should be banished from a store's promotional mix?

No way. When your ad announces a price break on dependable brands, this can prove an incentive for shoppers to make a special visit to your store. In the course of shopping to stock up on their favorite brand, most consumers will shop the rest of the store and fill their carts with everyday-priced items.

More important than the influence of the dependables on merchandising policies is their influence on stocking policies. When customers with a dependable product on their shopping list search the shelf space for that category and do not find their brand, what happens?

First of all, they're disappointed. If you don't stock—or are out of stock—of their favorite brand of, say canned hash, to them you don't even carry canned hash. Their brand *is* canned hash to them.

Naturally no store can carry every brand, even for strongly identified dependable categories. But it is critical to find out which brands are most in demand within these categories, make sure they're authorized at the warehouse and then given adequate shelf positions.

In addition, special attention should be given to evaluating how many items (size, flavor, etc.) within the brand should be stocked to satisfy loyalists. With their built-in audiences, these dependable category brands carry extra insurance that new products emanating from line extensions will be successful. Therefore, extra weight should be given in favoring their authorization.

Satisfying one-brand users through adequate stocking and reasonable promotion of their brands can help build and maintain a traffic flow of store-loyal, brand-loyal customers.

HOW TO TARGET ...

WHERE CUSTOMER BEHAVIOR DIFFERS

THE PROMOTABLES		THE DEPENDABLES
High	PRICE SENSITIVITY	Low
Low	BRAND LOYALTY	High
High	COUPON CRAZY	Low
Low	RELUCTANT TO SUBSTITUTE FOR OUT-OF-STOCKS	High
High	OPEN TO NEW PRODUCTS	Low
Neutral	EMBRACE LINE EXTENSIONS OF FAVORITE BRANDS	High
Low	HIGH STORE LOYALTY VIS-A-VIS BRAND LOYALTY	High
High	OPEN TO PRIVATE LABELS	Low
High	STOCK UP ON FAVORITE BRAND WHEN ON PRICE SPECIAL	Higher
High	WILLING TO SWITCH BRANDS ON WEEKLY SPECIAL	Low

RANKING OF MULTI-BRAND USERS—ADULTS (DRY GROCERY)

	All Users	Heavy Users
1. Candy bars, reg. size, individual*	**73.0%**	**89.7%**
2. Candy, big block/thick bar, individual	**54.9**	**74.3**
3. Soft drinks, reg. (not cola)	**47.9**	**52.1**
4. Beer, imported	**41.0**	**40.7**
5. Cola drinks, regular*	**39.9**	**49.4**
6. Beer, regular, domestic*	**39.2**	**42.0**
7. Cola drinks, diet*	**38.8**	**45.1**
8. Candy, pre-packaged loose	**38.2**	**54.2**
9. Chewing gum*	**38.1**	**41.0**
10. Wine coolers*	**36.6**	**45.0**
11. Candy, big block/thick bar, individual	**32.9**	**54.0**
12. Beer, low-calorie	**32.8**	**31.5**
13. Soft drinks, diet (not cola)	**32.4**	**37.6**
14. Wine, domestic, dinner/table	**32.3**	**34.4**
15. Wine, imported, dinner/table	**29.2**	**29.5**
16. Cough drops	**26.8**	**33.1**
17. Mints	**26.5**	**31.3**
18. Wine, sparkling/cold duck/champagne	**23.8**	**35.0**
19. Nuts, snack	**20.3**	**33.8**
20. Cigarettes*	**20.0**	**26.5**
21. Wine, party/pop/sangria	**18.9**	**27.2**
22. Ale	**18.2**	**20.7**
23. Wine, dessert/port/sherry	**17.6**	**24.9**
24. Artificial sweeteners	**15.9**	**24.1**
25. Malt liquor	**15.4**	**12.7**
26. Beer, no-alcohol	**13.9**	**8.5**
27. Disposable lighters	**13.8**	**23.3**
28. Water, bottled	**13.8**	**14.5**
29. Cigars[1]	**13.2**	**13.4**
30. Chewing/smokeless tobacco[1]	**13.0**	**12.8**
31. Vermouth	**11.2**	**15.8**
32. Beer, low-alcohol	**11.1**	**12.0**
33. Pipe tobacco[1]	**9.8**	**6.2**
34. Wine, aperitif/specialty	**7.9**	**14.7**
35. Cigarillos, little cigars	**7.4**	**2.7**
36. Hard roll candy	**5.2**	**9.5**

RANKING OF MULTI-BRAND USERS—FEMALE HOMEMAKERS (DRY GROCERY—FROZENS—DAIRY)

	All Users	Heavy Users
1. Breakfast cereals, cold*	**78.3%**	**94.1%**
2. Household cleaners	**77.2**	**96.5**
3. Vegetables, canned/jarred	**63.9**	**79.7**
4. BBq/seasoning sauces, bottled	**59.8**	**85.1**
5. Crackers	**56.7**	**82.1**
6. Breakfast/snack/nutritional bars*	**56.5**	**70.0**
7. Soup, dry mix/boullion cubes	**55.5**	**78.0**
8. Seasonings/spices	**55.3**	**85.1**
9. Fruit, canned/jarred*	**53.2**	**76.0**
10. Cookies, ready-to-eat*	**52.7**	**75.3**
11. Cheese snacks	**51.8**	**76.7**
12. Corn/tortilla chips & cheese snacks*	**51.8**	**75.5**
13. Fruit juices/drinks, canned	**51.0**	**71.0**
14. Frozen snacks	**49.9**	**69.7**
15. Salad dressing	**48.8**	**69.4**
16. Frozen desserts	**48.4**	**68.4**
17. Frozen main courses*	**47.9**	**68.3**
18. Bread	**47.8**	**59.9**
19. Laundry detergents*	**47.0**	**55.9**
20. Cake mixes, dry*	**45.0**	**67.3**
21. Pasta, packaged*	**44.9**	**57.6**
22. Mexican foods	**43.4**	**62.4**
23. Frozen vegetables, plain	**42.7**	**62.1**
24. Breakfast cereals, hot	**42.7**	**51.8**
25. Dinner mixes, packaged	**42.6**	**59.1**
26. Meat/fish extenders	**42.5**	**78.0**
27. Drink additives	**42.2**	**51.4**
28. Toilet paper	**41.0**	**48.9**
29. Potato chips	**40.2**	**55.8**
30. Frozen pizza*	**40.2**	**52.2**
31. Dog biscuits/treats	**39.9**	**65.0**
32. Frozen dinners	**38.7**	**45.8**
33. Refrigerated dough products	**38.6**	**48.9**
34. Yogurt*	**38.5**	**44.3**
35. Disposable diapers	**38.5**	**44.0**
36. Frozen vegetables, prepared	**38.0**	**49.7**
37. Soup, canned*	**38.0**	**43.6**
38. Fever reducers/pain relievers, children's	**37.9**	**53.9**
39. Furniture polish	**37.4**	**69.5**
40. Baking mixes	**37.0**	**64.2**
41. Bread crumbs/coating mixes	**36.9**	**81.5**
42. Beans, prepared in sauce	**36.9**	**52.1**
43. Coffee, ground	**36.6**	**48.3**
44. Cat food, dry	**36.2**	**35.0**
45. Frozen orange juice*	**36.1**	**51.7**
46. Paper towels*	**36.1**	**44.4**
47. Margarine*	**36.0**	**50.2**
48. Frozen potato products	**35.8**	**56.9**
49. Tuna, canned*	**35.5**	**50.1**
50. Air fresheners/sprays/room deodorizers	**35.4**	**67.7**
51. Rice, flavored/seasoned	**34.9**	**53.6**
52. Food storage/freezer/sandwich bags	**34.8**	**53.9**
53. Spaghetti sauce*	**33.9**	**52.0**
54. Snack cakes*	**33.9**	**46.8**
55. Fabric softeners	**33.7**	**45.2**
56. Tomatoes, canned*	**33.4**	**49.6**
57. Potatoes, instant	**32.8**	**59.1**
58. Baby foods*	**32.8**	**39.1**
59. Powdered soft drinks*	**32.7**	**33.0**
60. Popcorn snacks/popping corn	**32.6**	**41.5**
61. Facial tissues	**31.9**	**47.2**
62. Cat food, canned	**31.7**	**41.8**

[1]BASE = Men

*See table in study for demographic breakout of multi-brand users.

Source: Mediamark Re

RANKING OF MULTI-BRAND USERS—FEMALE HOMEMAKERS (DRY GROCERY—FROZENS—DAIRY)

	All Users	Heavy Users
63. Brownie/cookie mix	**31.5**	**66.1**
64. Bacon/breakfast strips	**31.4**	**40.0**
65. Frozen chicken, breaded/boneless	**31.0**	**59.7**
66. Syrup	**30.8**	**65.2**
67. Sausages	**30.8**	**42.4**
68. Dishwashing detergent, liquid	**30.6**	**35.0**
69. Orange juice, fresh/canned*	**30.5**	**45.5**
70. Cleaning wipes, pre-moistened	**30.2**	**37.5**
71. Pudding, pie filling	**29.9**	**43.8**
72. Metal polish	**29.8**	**81.3**
73. Frozen seafood	**29.5**	**45.2**
74. Oil, salad or cooking*	**29.1**	**43.9**
75. American past., processed cheese*	**29.1**	**46.8**
76. Whipped topping	**29.0**	**56.8**
77. Automatic dishwashing detergent*	**28.9**	**44.5**
78. Olives*	**28.9**	**43.2**
79. Frankfurters/weiners	**28.4**	**43.1**
80. Carpet cleaners	**28.3**	**57.6**
81. Jams/jellies	**28.2**	**48.7**
82. Pickles	**28.0**	**51.7**
83. Sugar*	**27.9**	**41.0**
84. Coffee, instant or freeze-dried*	**27.9**	**38.3**
85. Laundry pre-cleaners/pre-treatments	**27.6**	**38.5**
86. Deviled ham & other meat products	**27.3**	**52.1**
87. Cheese, natural or imported*	**27.1**	**45.5**
88. Baby ointment	**27.0**	**28.4**
89. Soap/detergent, fine fabrics	**26.7**	**48.7**
90. Frosting/frosting mixes	**26.3**	**41.3**
91. Gravy/sauce mixes	**26.1**	**35.7**
92. Tea, regular*	**25.8**	**30.7**
93. Plastic garbage bags/trash can liners	**25.8**	**27.5**
94. Tomato/vegetable juices, canned	**25.2**	**34.3**
95. Stuffing mixes/stuffing products	**25.1**	**40.0**
96. Gelatin desserts*	**24.9**	**31.0**
97. Frozen French toast/pancakes	**24.6**	**42.7**
98. Rice	**24.6**	**40.2**
99. Mayonnaise/mayo-type dressing*	**24.4**	**44.2**
100. Dog food, dry*	**24.0**	**25.9**
101. Scouring powder	**23.9**	**37.2**
102. Scouring pads	**23.5**	**26.1**
103. In-bowl toilet bowl cleaners	**23.1**	**38.6**
104. Mustard	**22.8**	**48.0**
105. Bleach	**22.7**	**40.4**
106. Pretzels	**22.5**	**36.6**
107. Pizza mix	**22.3**	**35.9**
108. Insecticides, indoor	**22.1**	**46.1**
109. Baking chips	**21.9**	**39.4**
110. Pie crusts, packaged	**21.7**	**42.8**
111. Cat litter	**21.5**	**27.4**
112. Dog food, canned	**21.3**	**22.5**
113. Mushrooms, canned/jarred	**21.2**	**30.3**
114. Dog food, moist	**21.1**	**26.1**
115. Plastic kitchen wrap	**21.1**	**42.9**
116. Paper napkins*	**20.5**	**30.5**
117. Frozen dough products	**20.4**	**38.4**
118. Pancake/waffle mix*	**20.4**	**34.3**
119. Peanut butter*	**20.2**	**39.6**
120. Floor wax/polish	**19.9**	**40.4**
121. Glass cleaners	**19.8**	**44.2**
122. Vitamins, children's	**19.8**	**39.9**
123. Toaster products	**19.7**	**29.6**
124. Light bulbs*	**19.6**	**32.0**
125. Frozen waffles*	**19.4**	**28.5**
126. Insect repellants	**19.4**	**22.6**
127. Ketchup	**19.0**	**36.8**
128. Frozen chicken, fried	**18.7**	**38.5**
129. Disposable plates	**18.5**	**32.3**
130. Infant cereal	**18.2**	**35.7**
131. Iced tea mix, instant*	**18.2**	**26.0**
132. Chili, canned	**18.2**	**24.1**
133. In-tank toilet bowl cleaners	**18.1**	**28.1**
134. Insecticides, outdoor	**17.8**	**46.9**
135. Baby powder	**17.7**	**36.0**
136. Ice cream/sherbert*	**17.7**	**19.3**
137. Instant hot lunches	**17.7**	**16.5**
138. Flea/tick products	**17.5**	**38.3**
139. Pasta, canned	**17.4**	**33.5**
140. Dips, ready-to-serve	**17.4**	**30.9**
141. Starch	**17.0**	**43.0**
142. Ham, canned	**16.3**	**20.1**
143. Extracts	**16.0**	**35.9**
144. Evaporated milk	**15.9**	**22.4**
145. Nuts, for cooking	**15.5**	**37.8**
146. Cat food, moist	**15.5**	**21.8**
147. Cheese spread	**15.2**	**36.5**
148. Frozen corn on the cob	**15.1**	**26.9**
149. Shortening	**15.0**	**28.3**
150. Charcoal	**14.9**	**25.0**
151. English muffins	**14.4**	**16.3**
152. Disposable cups	**13.9**	**13.7**
153. Oven cleaners*	**13.6**	**41.0**
154. Aluminum foil*	**13.4**	**29.3**
155. Cellophane tape	**12.9**	**24.8**
156. Nonstick cooking products, aerosol	**12.8**	**31.6**
157. Flour	**12.8**	**24.3**
158. Baby lotion	**12.5**	**6.3**
159. Drain cleaners	**12.0**	**47.3**
160. Croutons	**11.9**	**14.8**
161. Baby bath, liquid	**11.8**	**11.1**
162. Baking chocolate	**11.6**	**13.3**
163. Yeast	**11.4**	**19.8**
164. Butter	**11.0**	**19.5**
165. Soap for baby	**10.8**	**25.5**
166. Sweet rolls, ready-to-eat	**10.5**	**18.9**
167. Grapefruit juice, canned	**10.5**	**17.0**
168. Tea, instant	**10.2**	**13.7**
169. Infant formula, prepared	**9.6**	**8.0**
170. Cream cheese	**9.4**	**18.2**
171. Teething remedies	**9.4**	**11.6**
172. Salt substitutes	**9.3**	**21.4**
173. Cottage cheese	**9.2**	**21.6**
174. Hand cleaners, heavy duty	**9.0**	**18.2**
175. Baby oil	**8.7**	**13.3**
176. Pickle relish	**8.1**	**18.8**

*See table in study for demographic breakout of multi-brand users.
Source: Mediamark Research Inc.

RANKING OF MULTI-BRAND USERS—FEMALE HOMEMAKERS (DRY GROCERY—FROZENS—DAIRY)

	All Users	Heavy Users
177. Cream substitutes, non-dairy	7.9	10.2
178. Salt	7.8	19.4
179. Baby shampoo	7.8	8.5
180. Chicken, canned	7.3	10.6
181. Sour cream	7.3	6.8
182. Children's cough syrup	7.3	3.5
183. Hash, canned	6.7	14.8
184. Baking coconut	5.6	7.7
185. Breakfast drinks, powdered	5.2	16.5
186. Rubber gloves	5.2	13.6
187. Waxed paper	5.1	21.2
188. Honey	5.0	14.9
189. Milk, dry	4.5	7.9
190. Disposable household wipes	4.2	4.4
191. Oven cooking bags	4.1	6.7
192. Liver sausage, liverwurst	3.2	8.1

Source: Mediamark Research Inc.

WHAT THE NUMBERS SAY ABOUT YOUR CUSTOMERS

The promotable potential of an individual product category can range from very low (for example, baking coconut, where only 5.6 percent of users buy more than one brand) to very high (for example, cold breakfast cereals, where 78.3 percent of users are multi-brand purchasers*).

The usefulness of these data in formulating merchandising strategy can be enhanced by analyzing each category demographically. Matching the characteristics of consumers who are most likely to purchase more than one brand with those of consumers you observe patronizing your store can help maximize the payout from your merchandising effort.

For example, the statistics for diet cola drinks shown on page 59 show that 38.8 percent of all category users are multi-brand purchasers. That's not necessarily the case for your store, however. Perhaps, for example, your store draws heavily on households with income of over $40,000 a year, 43.5 percent of which report multi-brand purchases of diet colas (12 percent higher than the incidence for all users). That means there's an even greater urgency for taking action on the promotable categories within your store.

Conversely, stores with a low-household-income constituency should give less weight to this product category and explore the potential of others where the low-income sector is above average in propensity toward multi-brand purchasing.

On the pages following the introduction to this report, almost six dozen product categories are shown in detail.

A

The pie comprises all users of the product category. In this case, 38.8 percent purchased more than one brand in the survey reporting period, while the balance (61.2 percent) of the users restricted their consumption to only one brand.

B

Heavy users traditionally account for a minority of all users (in the case of diet cola drinks, heavy users—those who consume 6 or more glasses per week—are 42 percent of total users), but account for a majority of tonnage (82 percent for diet colas). Heavy users tend to have a stronger proclivity for multi-brand purchase than do all users, therefore strengthening the case for a category to be merchandised as promotable.

	Diet Cola
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS	38.8% / 61.2%
HEAVY USERS	■45.1% ■54.9%
How multi-brand users v	
EDUCATION	
DID NOT GRAD HS	−18
GRAD HS	− 3
ATT'D COLLEGE	+12
AGE	
18-34	+ 8
35-54	+ 8
55+	−24
HOUSEHOLD INCOME	
UNDER 20	−16
20-40	− 3
40+	+12
REGION	
NORTHEAST	+10
NORTH CENTRAL	+ 8
SOUTH	−11
WEST	− 3
MARITAL STATUS	
SINGLE	+17
MARRIED	—
OTHER	−21
SIZE OF HOUSEHOLD	
1 PERSON	−20
2 PERSONS	− 5
3+ PERSONS	+ 5
RACE	
WHITE	+ 1
BLACK	−11

*Read as "Non-high school graduates are 13 percent less likely th

C

The statistics for the seven demographic groups are intended to be evaluated in the framework of the demographic makeup of your store's customer base. With region as a given, consider the degree to which you find your trading area is above average (compared to the national norm) on each of the other six demographic breakouts.

The **plus figures** mean that the incidence of multi-brand usage is stronger among users in a particular sub-group than it is among all users. (For example, 45.4 percent of singles who use diet colas are multi-brand users—meaning they are 17 percent more likely to be multi-brand purchasers.)

The **minus figures** mean that the incidence of multi-brand usage is weaker among users in a particular sub-group than it is among all users. (For example, only 33.4 percent of those 55-and-older users of diet colas are multi-brand users—meaning they are 24 percent less likely to be multi-brand purchasers.)

A **dash** on the table means a particular sub-group is no more or less likely than the average user to be a multi-brand purchaser.

RANKING OF MULTI-BRAND USERS

ADULTS' HBA

	All Users	Heavy Users
1. Headache remedies/pain relievers	38.4%	49.2%
2. First aid products*	37.9	48.8
3. Toothpaste*	35.5	54.2
4. Cold/sinus/allergy remedies*	34.8	47.6
5. Indigestion aids	28.4	42.6
6. Sunscreen/suntan domestics*	26.6	34.2
7. Lip balm	23.7	41.1
8. Body powder	22.2	52.0
9. Cough syrup	21.3	26.3
10. Breath fresheners	19.4	36.4
11. Mouthwash*	19.3	31.6
12. Adhesive bandages	19.0	27.5
13. Pain-relieving rubs/liquids	18.5	25.8
14. Throat remedies, medicated	17.9	21.0
15. Sunburn remedies	15.5	20.7
16. Laxatives	15.1	22.9
17. Asthma relief remedies	15.0	23.6
18. Eye drops/eye wash	14.0	16.5
19. Toothbrushes	13.2	25.6
20. Canker sore/gum/toothache remedies	13.2	20.1
21. Hemorrhoid remedies	11.8	23.0
22. Athlete's foot remedies	11.5	17.6
23. Denture cleaners	10.4	28.2
24. Diarrhea remedies	10.3	22.6
25. Denture adhesive/fixitive	10.1	26.9
26. Vitamins, tablets/capsules/liquids	9.7	19.6
27. Nasal sprays	9.0	12.2
28. Dental floss	4.5	8.3

WOMEN'S HBA

	All Users	Heavy Users
1. Perfume/cologne	52.4	75.4
2. Soaps, personal care, bar	51.3	65.7
3. Body/hand creams/lotions/oils	42.3	61.8
4. Shampoo*	38.3	47.7
5. Sanitary napkins	36.4	45.2
6. Nail polish	34.4	55.3
7. Deodorant/antiperspirant*	30.7	74.1
8. Eye shadow	29.4	56.7
9. Medicated skin ointment	28.9	37.9
10. Complexion care	28.5	55.5
11. Lipstick/lip gloss*	28.2	40.9
12. Face creams	28.1	85.5
13. Hair conditioners	21.7	26.3
14. Hair sprays	20.0	32.0
15. Blusher	19.5	40.4
16. Foundation makeup	18.6	37.1
17. Hair mousse	17.5	23.6
18. Mascara	15.2	32.0
19. Bath/shower additives	15.1	17.9
20. Shaving cream/gel	15.0	51.8
21. Eye liner	15.0	32.2
22. Razors, disposable	14.9	18.4
23. Soaps, personal care, liquid	14.8	25.6
24. Pressed powder	14.7	36.5
25. Body spray	13.4	16.4
26. Fem. hyg. douches/suppositories	12.8	21.6
27. Menstrual pain remedies	12.0	16.9
28. Tampons	12.0	12.8
29. Hair coloring*	11.5	17.2
30. Face powder, loose	10.9	16.5
31. Hair setting products	9.7	11.6
32. Facial toners	9.5	21.5
33. Depilatories	8.6	8.8
34. Razor blades	8.5	35.8
35. Facial cleansers	7.1	15.2
36. Home permanents	7.0	29.8

MEN'S HBA

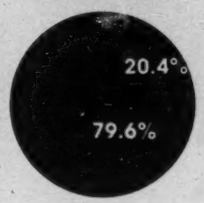
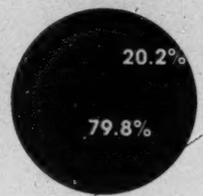
	All Users	Heavy Users
1. Soaps, personal care, bar	39.5%	53.8%
2. Aftershave lotion/cologne	37.6	67.0
3. Hand/body creams/lotions/oils	31.8	62.0
4. Shampoo*	28.7	33.0
5. Deodorants/antiperspirants*	27.3	81.7
6. Medicated skin ointments*	23.4	34.5
7. Complexion care products	22.6	51.6
8. Hair conditioners	15.7	17.4
9. Hair sprays	15.5	31.0
10. Disposable razors	15.4	16.9
11. Shaving creams or gels*	14.0	30.2
12. Soaps, personal care, liquid	10.6	19.3
13. Razor blades*	8.1	26.7
14. Hair coloring	7.9	14.2

GENERAL MERCHANDISE

	All Users	Heavy Users
1. Video tapes/discs (A)*	45.7%	67.9%
2. Batteries (FH)*	35.5	57.2
3. Pantyhose/stockings (W)*	27.5	38.4
4. Film (A)*	20.2	32.2
5. Auto wax/polish (A)	16.8	28.8
6. Motor oil (A)*	16.6	27.3
7. Gasoline additives (A)	11.6	18.6
8. Plant food, indoor (FH)	6.8	22.5
9. Anti-freeze (A)	5.8	11.9
10. Motor oil additives (A)	4.0	6.3

(A) = Adults. (W) = Women. Source: Mediamark Research Inc.
(FH) = Female Homemakers. *See table in study for demographic breakout of multi-brand users.

DRY GROCERY—FOOD

	Baby Foods	Cold Cereal	Snack Bars	Pancake/Waffle Mix	Peanut Butter
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 39.1% ■ 60.9%	■ 94.1% ■ 5.9%	■ 70.0% ■ 30.0%	■ 34.3% ■ 65.7%	■ 39.6% ■ 60.4%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	−18*		−6		−10		−10		−12	
GRAD HS	−14			+2		+ 4	− 7			+ 2
ATT'D COLLEGE		+30		+2				+17		+ 6
AGE										
18-34		+13		+4		+ 5	−12			+11
35-54	−20			+4		+ 3		+14		+ 3
55+	−44		−8		−24		− 4		−17	
HOUSEHOLD INCOME										
UNDER 20	−43		−6		−13		−10		− 8	
20-40		+28		+1		+ 2		+ 7		+ 6
40+		+ 6		+5		+ 5		+ 2		+ 1
REGION										
NORTHEAST		+22	−1			+ 9	− 7			+12
NORTH CENTRAL		+ 4		+8		+ 4		+19		+ 7
SOUTH	−21		−4		−10		− 7		− 6	
WEST		+13	−6				− 8		−14	
MARITAL STATUS										
SINGLE	− 6			+8	−12		−15			+ 3
MARRIED		+ 7		+5		+ 3		+ 5		+ 4
OTHER	−39		−9		−11		−11		−16	
SIZE OF HOUSEHOLD										
1 PERSON	−34		−19		−21		−21		−41	
2 PERSONS	−67		−5		−17		− 6		−11	
3+ PERSONS		+ 9		+8		+ 7		+ 6		+15
RACE										
WHITE	—	—		+1		+ 1	− 4		− 3	
BLACK		+ 2	−8		− 6			+36		+19

Base = Female homemakers
*Read as, "Non-high school graduates are 18 percent less likely than all purchasers to be multi-brand users."

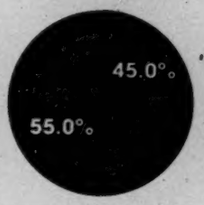
Source: Mediamark Research Inc.

BABY PRODUCTS: Given the varieties of fruits, vegetables, desserts and meals that fall under the general category of baby foods, it's not surprising that one in three mothers includes multiple brands in her feeding repetoire. Experimentation is lower for formula and infant cereal (9.6 percent and 18.2 percent respectively). For baby's HBA products, loyalty is even higher with, for example, 91.3 percent of baby oil users and 82.3 percent of baby powder users sticking to one brand.

BREAKFAST FOODS: As seen in the table in the introduction to this study, no category counts a higher proportion of multi-brand users than does cold breakfast cereals. Pancake and waffle mix shows relatively light multi-brand usage, with black consumers most prominent in this regard. Merchandising possibilities are suggested by a similar pattern for the purchase of breakfast syrup (not shown) by black consumers. Large families most frequently buy more than one brand of peanut butter.

MULTI-BRAND USERS STUDY

DRY GROCERY—FOOD

	Candy Bars	Chewing Gum	Dry Cake Mixes	Gelatin Desserts	Sugar
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 89.7% ■ 10.3%	■ 41.0% ■ 59.0%	■ 67.3% ■ 32.7%	■ 31.0% ■ 69.0%	■ 41.0% ■ 59.0%

How multi-brand users vary from all users by demographics (in percent)

	Candy Bars	Chewing Gum	Dry Cake Mixes	Gelatin Desserts	Sugar
EDUCATION					
DID NOT GRAD HS	– 6*	–10	– 3	–14	–21
GRAD HS	+ 3	+ 1	– 2	– 3	+6
ATT'D COLLEGE	+ 1	+ 6	+ 4	+16	+ 8
AGE					
18-34	+ 8	+15	– 3	–11	—
35-54	+ 1	– 6	+ 8	+14	+13
55+	–16	–25	– 7	– 6	–15
HOUSEHOLD INCOME					
UNDER 20	– 5	– 6	–12	–16	–22
20-40	—	+ 2	+ 7	—	+13
40+	+ 3	+ 2	+ 4	+17	+ 9
REGION					
NORTHEAST	– 4	–35	– 3	+12	–10
NORTH CENTRAL	+ 5	+ 6	+11	+18	+36
SOUTH	– 3	+ 2	– 3	–25	–11
WEST	+ 3	– 2	– 9	+ 1	–18
MARITAL STATUS					
SINGLE	+ 5	+ 6	–22	–12	–33
MARRIED	+ 1	+ 1	+ 7	+ 9	+15
OTHER	– 7	–11	–14	–23	–29
SIZE OF HOUSEHOLD					
1 PERSON	–11	–23	–21	–23	–29
2 PERSONS	– 5	– 7	– 3	+ 4	–10
3+ PERSONS	+ 4	+ 8	+ 5	+ 4	+13
RACE					
WHITE	—	+ 1	+ 2	+ 3	+ 5
BLACK	– 3	– 7	–12	– 6	–33

*Read as "Non-high school graduates are 6 percent less likely than all purchasers to be multi-brand users."

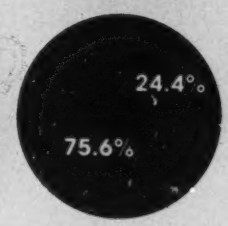
Source: Mediamark Research Inc.

CANDY: Sweet teeth look for variety, suggesting that they're willing targets for instore merchandising efforts. Multiple-brand purchase of candy bars is indulged in by 73.0 percent of users, with only older users showing any degree of resistance. Younger chewers of chewing gum are most likely to pop from brand to brand. Among the candy categories not charted here, only one, hard roll candy, shows a paucity of multi-brand usage.

DESSERTS/BAKING INGREDIENTS: For both sugar and gelatin desserts, only one user in four strays from her regular brand, with those in the prime of their dessert-preparation years (35 to 54) most likely to experiment. No doubt tempted by an unending stream of innovative new products, almost half of baking homemakers buy more than one brand of dry cake mix. Among categories not charted, most show a low level of multi-usage.

MULTI-BRAND USERS STUDY

DRY GROCERY—FOOD

	Corn Chips, Cheese Snacks	Cookies	Snack Cake	Mayo./Mayo.-Type Dressing	Salad/Cooking Oil
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 23.3% ■ 76.7%	■ 75.3% ■ 24.7%	■ 46.8% ■ 53.2%	■ 44.2% ■ 55.8%	■ 43.9% ■ 56.1%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION					
DID NOT GRAD HS	−10*	−17	−5	−10	−13
GRAD HS	+ 3	+ 4	—	− 4	+ 2
ATT'D COLLEGE	+ 2	+ 6	+ 3	+12	+ 7
AGE					
18-34	+ 6	− 4	+ 4	− 8	− 3
35-54	+ 6	+15	+13	+12	+13
55+	−26	−14	−29	− 5	−11
HOUSEHOLD INCOME					
UNDER 20	−10	−16	−15	−10	−18
20-40	+ 3	+ 1	+ 9	+ 2	+ 4
40+	+ 5	+14	+ 3	+ 8	+14
REGION					
NORTHEAST	− 5	+12	+ 9	+ 3	+13
NORTH CENTRAL	+ 9	+ 8	+15	+20	+ 3
SOUTH	+ 2	−12	− 6	− 9	− 7
WEST	−12	− 4	−28	−14	− 6
MARITAL STATUS					
SINGLE	− 6	−15	−16	−18	−19
MARRIED	+ 4	+ 8	+ 6	+ 9	+ 9
OTHER	−12	−17	−12	−18	−18
SIZE OF HOUSEHOLD					
1 PERSON	−18	−23	−31	−19	−31
2 PERSONS	−16	−10	− 5	+ 2	− 2
3+ PERSONS	+ 9	+10	+ 7	+ 4	+10
RACE					
WHITE	+ 1	+ 3	—	+ 1	+ 1
BLACK	−11	−26	−11	−12	− 5

Base = Female homemakers
*Read as, "Non-high school graduates are 10 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

SNACKS: Half the users of products in the category corn/tortilla chips, cheese snacks consume more than one brand. The demographic group that's most loyal to one brand is those aged 55 and over. Both popcorn and potato chips snackers show a lower rate of multi-brand usage.

BAKED GOODS: Both cookies (above) and crackers (not shown) tempt about half of users to spread their patronage over several brands. This is particularly prevalent in larger households with several palates to please. The two categories of baked goods with the strongest allegiance to one brand are croutons and English muffins.

OILS/DRESSINGS/CONDIMENTS: Despite their above-average promotional activity, mayonnaise and oils show frequent brand-switching among only one user in four. With myriad varieties available, salad dressing shows a high (48.8 percent) multi-user rate (not shown).

MULTI-BRAND USERS STUDY

DRY GROCERY—FOOD

	Wine Coolers	Olives	Canned Tuna	Canned Soup	Packaged Pasta
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 45.0% ■ 55.0%	■ 43.2% ■ 56.8%	■ 50.1% ■ 49.9%	■ 43.6% ■ 56.4%	■ 57.6% ■ 42.4%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	−19*		−13		−18		−25		−14	
GRAD HS		+ 3	− 2			+ 1	—	—		+ 2
ATT'D COLLEGE		+ 5		+10		+11		+17		+ 7
AGE										
18-34		+15	−22		− 7		—	—	− 4	
35-54	−15			+19		+ 5		+ 6		+12
55+	−36		− 2			+ 2	− 7		−11	
HOUSEHOLD INCOME										
UNDER 20	− 4		−26		−10		−18		−20	
20-40	− 1			+ 2		+ 7		+ 3		+ 9
40+		+ 3		+17		+ 1		+14		+ 9
REGION										
NORTHEAST	− 4		—	—		+20		+21		+27
NORTH CENTRAL		+ 4		+18		+ 4		+ 1		+11
SOUTH	− 7		− 7		−18		−15		−18	
WEST		+15	−14			+ 2		+ 3	−16	
MARITAL STATUS										
SINGLE		+24	−24		− 2		− 8		−19	
MARRIED	− 6			+ 9		+ 4		+ 5		+ 7
OTHER	−19		−22		− 9		−11		−13	
SIZE OF HOUSEHOLD										
1 PERSON	− 9		−34		− 8		−15		−27	
2 PERSONS	− 3			+ 2		+13	− 2		− 5	
3+ PERSONS		+ 2		+ 6	− 5			+ 5		+ 9
RACE										
WHITE		+ 3		+ 3		+ 2		+ 4		+ 2
BLACK	−23		−36		−12		−36		−20	

Base = Female homemakers
*Read as, "Non-high school graduates are 19 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

WINE: In the relatively new product category of wine coolers, over one third of all users and about half of heavy users are still experimenting among various brands to see what they like. Younger single users and those in the West shop around the most. More established wine categories such as vermouth, party wines and dessert wines (not shown) have only half as much brand sampling.

PACKAGED SPECIALTY FOODS: The four categories charted above are among the most heavily merchandised in the typical supermarket. And small wonder, given their high-voltage abilities to effect brand switching. Canned tuna and packaged pasta, often found in the same casserole together, both pull well in middle-income neighborhoods. Southern customers and blacks both show high loyalty to one brand.

MULTI-BRAND USERS STUDY

DRY GROCERY—FOOD

	Domestic Beer	Instant/Freeze-Dried Coffee	Regular Tea	Iced Tea Mix	Powdered Soft Drinks
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 42.0% ■ 58.0%	■ 38.3% ■ 61.7%	■ 30.7% ■ 69.3%	■ 26.0% ■ 74.0%	■ 33.0% ■ 67.0%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	−28*		− 8		−24			+12	−11	
GRAD HS	− 4		− 6		− 7		−10			+ 2
ATT'D COLLEGE		+19		+14		+27		+ 4		+ 4
AGE										
18-34		+14	−12		− 3		− 8		− 1	
35-54	− 4			+ 6		+19		+23		+ 5
55+	−30			+ 3	−19		−19		− 9	
HOUSEHOLD INCOME										
UNDER 20	−13		−14		−27		− 3		−11	
20-40		+ 1		+ 6		+12		+ 2		+ 3
40+		+ 7		+ 8		+13	—	—		+ 6
REGION										
NORTHEAST	− 6			+25		+25		+34		+18
NORTH CENTRAL		+21		+ 1	− 7		−13			+ 7
SOUTH	− 3		−11		−26		−13		− 8	
WEST	−13		−14			+28	− 9		−20	
MARITAL STATUS										
SINGLE		+13	−28			+12		+ 4		+ 5
MARRIED	− 1			+ 7		+ 4		+ 5		+ 4
OTHER	−18		− 6		−17		−20	—	−16	
SIZE OF HOUSEHOLD										
1 PERSON	−16		−11		−28		−21		−25	
2 PERSONS		+ 1		+ 1		+ 2	− 5			+ 1
3+ PERSONS		+ 2		+ 3		+ 6		+ 6		+ 3
RACE										
WHITE		+ 3		+ 3		+ 2	− 2		− 2	
BLACK	−20		−24		−22			+10		+10

Base = Female homemakers
*Read as, "Non-high school graduates are 28 percent less likely than all purchasers to be multi-brand users."

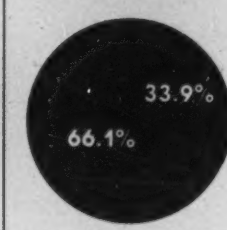
Source: Mediamark Research Inc.

BEER: Despite their occasional interruption for coverage of football, those ubiquitous beer commercials seem to be working, as four out of 10 drinkers of regular (shown above) and imported (not shown) beer are multi-brand users. The incidence is even greater among such prime targets as college-educated, upper-income, single and young drinkers. Specialty beer categories like malt liquor ale, and no-alcohol or low-alcohol beers show less than a third this rate of multi-brand usage.

FAMILY BEVERAGES: Drinkers of instant coffee are a reasonably loyal lot, with only 27.9 percent saying they're less than true to their favorite brand of brew. The rate is somewhat higher (36.6 percent) for ground coffee (not shown). While only one in five iced tea drinkers confess multi-brand sipping, stores in the Northeast or with a black patronage will find the rate higher. Two other categories have low multi-brand usage: dry milk (4.5 percent) and non-dairy cream substitutes (7.8 percent).

MULTI-BRAND USERS STUDY

DRY GROCERY—FOOD

	Regular Cola	Diet Cola	Canned/Jarred Fruit	Canned Tomatoes	Spaghetti Sauce
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 49.4% ■ 50.6%	■ 45.1% ■ 54.9%	■ 76.0% ■ 24.0%	■ 49.6% ■ 50.4%	■ 52.0% ■ 48.0%

How multi-brand users vary from all users by demographics (in percent)

	Regular Cola		Diet Cola		Canned/Jarred Fruit		Canned Tomatoes		Spaghetti Sauce	
EDUCATION										
DID NOT GRAD HS	−13*		−18		−18		−40		− 8	
GRAD HS		+ 4	− 3			+ 4		+ 2		+ 1
ATT'D COLLEGE		+ 6		+12		+ 8		+26		+ 4
AGE										
18-34		+12		+ 8	− 9		− 2		—	—
35-54		+ 2		+ 8		+ 9		+19		+ 2
55+	−27		−24		− 2		−21		− 3	
HOUSEHOLD INCOME										
UNDER 20	− 9		−16		−15		−32		−11	
20-40	—	—	− 3			+ 6		+ 5		+ 5
40+		+ 7		+12		+ 8		+25		+ 4
REGION										
NORTHEAST		+ 5		+10		+ 2		+17		+15
NORTH CENTRAL		+14		+ 8		+ 9	—	—		+10
SOUTH	− 7		−11		− 8		−22		− 5	
WEST	−10		− 3		− 4			+20	−20	
MARITAL STATUS										
SINGLE		+ 7		+17	−19		−12		− 8	
MARRIED		+ 2	—	—		+ 5		+ 9		+ 4
OTHER	−18		−21		− 7		−21		− 8	
SIZE OF HOUSEHOLD										
1 PERSON	−24		−20		− 9		−32		−10	
2 PERSONS	−10		− 5		− 4			+ 1		+ 3
3+ PERSONS		+ 8		+ 5		+ 5		+ 8		+ 1
RACE										
WHITE	—	—		+ 1		+ 3		+ 3	− 2	
BLACK		+ 1	−11		−31		−33			+11

Base = Female homemakers
*Read as, "Non-high school graduates are 13 percent less likely than all purchasers to be multi-brand users."

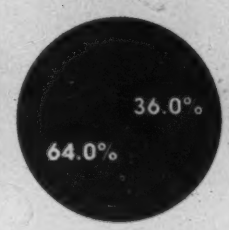
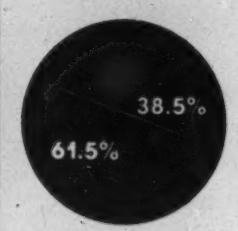
Source: Mediamark Research Inc.

SOFT DRINKS: Four out of 10 cola drinkers—regular or diet—make it a habit to drink more than just one brand. The young and the single are most likely to be tasting among the brands, but older cola drinkers are more likely to stick with a single taste.

CANNED FRUITS/VEGETABLES: Given the range of possibilities store shelves can offer, it's not surprising that canned fruits (charted above), as well as canned vegetables and canned juices, show high multi-brand usage. For specialties like canned tomatoes and canned mushrooms, however, loyalty to one brand exerts itself more strongly.

SAUCES: New brands as well as line-extensions within brands continue to expand the possibilities of spaghetti sauce, one-third of whose users buy multiple brands. Black users are particularly prone to try a new spaghetti sauce, as are those living in the Northeast and North Central regions.

DAIRY

	Processed Cheese	Natural/Imported Cheese	Margarine	Orange Juice, Fresh and Canned	Yogurt
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 46.8% ■ 53.2%	■ 45.5% ■ 54.5%	■ 50.2% ■ 49.8%	■ 45.5% ■ 54.5%	■ 44.3% ■ 55.7%

How multi-brand users vary from all users by demographics (in percent)

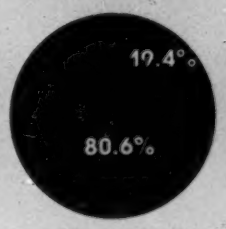
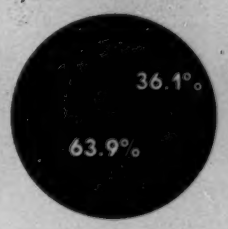
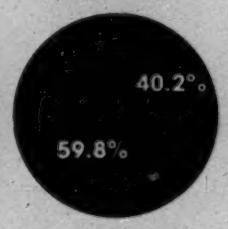
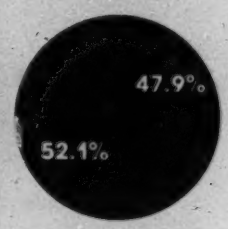
EDUCATION										
DID NOT GRAD HS	−16*		−30		− 6		−12		−12	
GRAD HS		+ 2				+ 5			− 1	
ATT'D COLLEGE		+10		+14		+ 6		+10		+ 5
AGE										
18-34		+ 3		+ 4	− 2		− 6		− 1	
35-54		+15		+17		+10		+ 9		+11
55+	−22		−28		− 9		− 5		−19	
HOUSEHOLD INCOME										
UNDER 20	−25		−26		−15		−13		− 6	
20-40		+ 7				+ 5			− 4	
40+		+17		+18		+11		+12		+ 7
REGION										
NORTHEAST		+10		+ 3		+ 6		+22		+15
NORTH CENTRAL		+22		+29		+14	− 3			+ 1
SOUTH	−11		−19		− 6		− 7		− 2	
WEST	−22		−13		−16		−26		−15	
MARITAL STATUS										
SINGLE	−19		−20		−18		−14		− 3	
MARRIED		+12		+ 9		+12		+ 6		+ 5
OTHER	−28		−19		−24		−12		−17	
SIZE OF HOUSEHOLD										
1 PERSON	−31		−25		−27		−26		−21	
2 PERSONS	− 7		− 9		− 5			+ 6	− 3	
3+ PERSONS		+11		+11		+10		+ 2		+ 5
RACE										
WHITE		+ 4		+ 4		+ 2	− 4		− 1	
BLACK	−35		−40		−14			+25		

Base = Female homemakers
*Read as, "Non-high school graduates are 16 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

DAIRY: For the five popular dairy product categories shown above, almost half of heavy users purchase more than one brand. All five— but particularly margarine— figure prominently in producer-sponsored cents-off coupon campaigns designed to lure consumers to try a new brand. Predisposition to purchase more than one brand within a dairy category is highest in the Northeast and North Central regions, with those in the South and West proving less fickle. Better educated, upper-income users like to stock their refrigerators with two or more brands. For both cheese categories (American and natural), blacks repurchase a brand that's proved satisfactory. But the opposite is true for refrigerated orange juice, where blacks are 25 percent more likely than all users to be multi-purchasers. Among the dairy categories not shown here in detail, butter, cream cheese, cottage cheese and sour cream all provoke high loyalty, with roughly one user in 10 straying to a second brand.

FROZEN FOODS

	Ice Cream/ Sherbert	Waffles	Orange Juice	Pizza	Main Courses
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 19.3% ■ 80.7%	■ 28.5% ■ 71.5%	■ 51.7% ■ 48.3%	■ 52.2% ■ 47.8%	■ 68.3% ■ 31.7%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	−32*		− 8		− 8		− 7		−13	
GRAD HS	− 5		− 9		− 4		− 1		− 4	
ATT'D COLLEGE		+30		+16		+10		+ 5		+11
AGE										
18-34		+10	− 6		− 5			+ 8	− 4	
35-54		+15		+18		+ 7		+ 2		+ 5
55+	−28		−16		− 3		−14		− 1	
HOUSEHOLD INCOME										
UNDER 20	−36		−19		−11		− 7		−10	
20-40	− 6		− 1			+ 6		+ 5	− 5	
40+		+42		+14		+ 4		+ 2		+12
REGION										
NORTHEAST		+60		+13		+ 9	− 3		−10	
NORTH CENTRAL	−16		—	—		+10		+ 5	− 8	
SOUTH	−14		−35		−13			+ 4	—	—
WEST	−24			+37	− 2		−15			+10
MARITAL STATUS										
SINGLE	− 7		−56		−12		− 8		− 4	
MARRIED		+ 7		+14		+ 7		+ 5	—	—
OTHER	−19		−22		−15		−15			+ 1
SIZE OF HOUSEHOLD										
1 PERSON	−38		−37		−15		−28			+ 1
2 PERSONS	− 6		− 5		− 7		− 9			+ 6
3+ PERSONS		+12		+ 9		+ 8		+ 9	− 4	
RACE										
WHITE		+ 2		+ 3		+ 1	− 1			+ 1
BLACK	−20		−35		− 1			+ 7	−15	

Base = Female homemakers
*Read as, "Non-high school graduates are 32 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

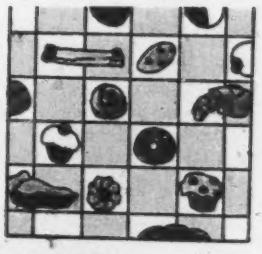
FROZEN FOODS: Frozen food purchasers are prone to vary their menus by choosing from among several brands within a product category. Half of all users of frozen main courses, for example, do so, especially those with college educations and those living in upper-income households. Two-person households and those in the West are generally prone to keeping a mixture of brand labels in their freezers. In-case or in-ad promotions for main courses should catch shoppers' attention, as should those for such other high multi-brand categories as both plain and prepared frozen vegetables (not shown), and frozen orange juice and pizza (see above). The penchant of blacks towards multi-brand buying of pizza (7.0 percent higher than the all-buyer average) carries over to frozen chicken, potato products and corn on the cob. Larger households spread their patronage over several brands of orange juice, pizza and ice cream/sherbet. One-brand loyalty dominates breakfast lines like waffles and French toast/pancakes as well as ice cream (above).

InStore BAKERY BUSINESS

SIXTH ANNUAL OPERATIONS REPORT

INSTORE BAKERY REVIEW

BY DAVID LITWAK, DIRECTOR OF RESEARCH



CENSUS
8A

SALES, MARGIN & PRODUCT MIX
9A

LABOR & SERVICE
10A

There may be a great deal of doubt about what kind of a year 1987 was, but when the conversation gets around to instore bakeries, 1987 will be fondly remembered as a year of growth.

Growth when it comes to the instore bakery is nothing new. INSTORE BUSINESS has provided readers with a chronicle of this department's growth every year since 1982. What is news is that 1987 saw growth that peaked at a level higher than that we've been seeing in the past few years.

For instance, there are presently 18,850 instore bakery units. This is an increase of 6.6 percent over the 17,680 that existed at the end of 1986. The gain of 6.6 percent surpasses the gains of about 4.0 percent in each of the previous three years. It is not surprising that all these additional bakery units provided an impetus to instore bakery sales, lifting them to a level of $4.78 billion in 1987, which is over nine percent more than 1986 sales.

More decided growth

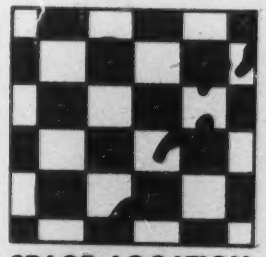
The increase in bakeries far outshines the growth of stores. While bakery units increased 6.6 percent, the number of supermarkets was declining in 1987. There are now bakeries in 62 percent of the nation's supermarkets.

The bakery, therefore, has become a staple in most of the designs for new and remodeled stores. Since so many stores now include bakeries and an even larger percentage will in the future, the role of the bakery as a drawing card for the store has changed. No longer is it enough to have a bakery unit to attract customers. The ability of the bakery to generate traffic for a store will be based on the quality and variety image of the unit, much the same as the perceived appeal that older departments such as produce and meat project.

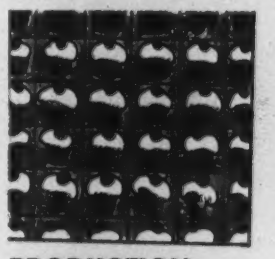
In this sense, the instore bakery is a mature department; it has been accepted by operators and consumers, and both groups expect to find the unit in most stores. It is now up to the individual units to distinguish themselves from competing units in neighboring stores.

Products and service

Instore bakeries are no different than the stores that they are in. What emerges in this year's Annual Operations Review is that bakery operators are still searching for the right mix of products to offer their customers; the preparation method that will best convey the image



SPACE, LOCATION & EQUIPMENT
11A



PRODUCTION & SUPPLY
14A

MERCHANDISING & CUSTOMERS
14A

of freshness without blowing production costs through the roof; keeping an attractive shopping area, and trying to balance the convenience of self-service with the positive aspects of personal service.

Product mix, production and labor, attractive shopping areas, convenience and service are the elements that power any department in the store, as well as the whole store. These elements are increasingly being refined by management of the instore bakeries to give their units that distictiveness that will help them attract customers to the store.

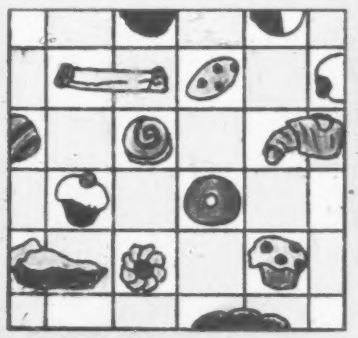
Retailers tell INSTORE BUSINESS that they are still experimenting with the service-vs.-self-service mix, with the roughly 41 percent of their staff's labor hours going into direct customer service. This represents a slight increase over the previous year. At the same time there is a marked increase in the number of stores that now offer bulk self-service items (40 percent of units offer this), and this now accounts for 17 percent of all bakery sales.

The methods of preparation of many products continued to shift in 1987, with scratch and mix preparations being used more for some products, especially items such as croissants and sweet goods. While still the dominant production method, bake-off preparations have declined slightly in usage among instore bakers for production of all classes of products. This has caused an increase in the percentage of the non-customer service labor hours for production, and enhanced the degree to which instore bakery employees must receive specialized training.

Any good retail organization continuously must refine its product mix to keep current with changing consumer tastes. The instore bakery is no different. Among those items that were reportedly added to bakery line-ups last year were muffins, decorated cakes, danish and croissants. This is the second year that muffins and decorated cakes have made this most-increased list.

Interestingly, croissants were among those items that were reported to be declining in 1986, and even more interesting is that many retailers still report

Continued on page 22A



BAKERY/CENSUS

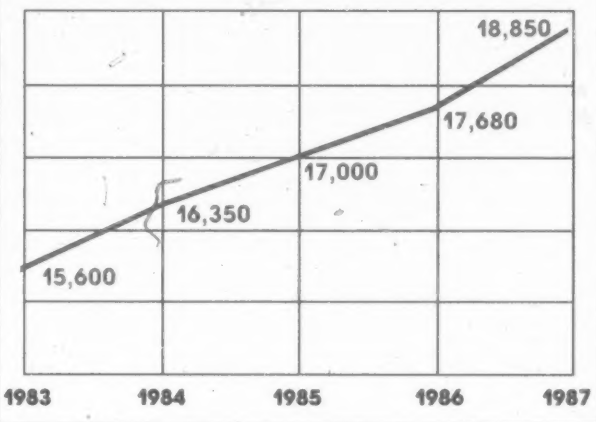
For instore bakeries in 1987 it was "All Systems Grow!" Bakery units are established in 62 percent of all supermarkets, making them easily accessible to a majority of Americans who are beginning to rely on these units for fresh baked goods.

The 18,850 bakery units that were operating in 1987 represented healthy industry growth (up 6.6 percent from 1986). With the average bakery unit contributing $4,875 a week in sales, total instore bakery sales climbed to a new annual high of $4.78 billion last year. The growth in units and sales during 1987 was encouraging because it surpassed the rates of growth that the instore bakery segment had been experiencing during recent years.

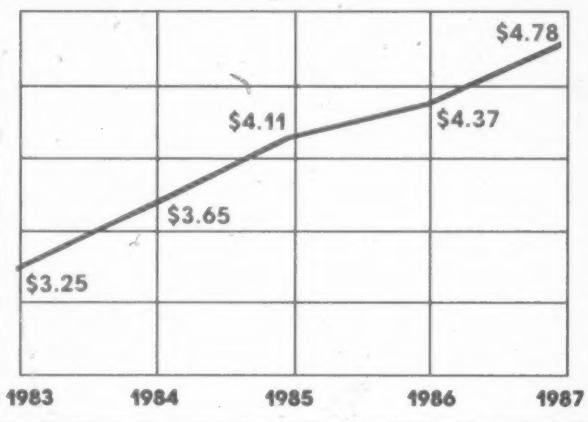
Is Portion of Store Overhead Allocated Back to Instore Bakeries?

Yes	40%
No	60%
Total	100%

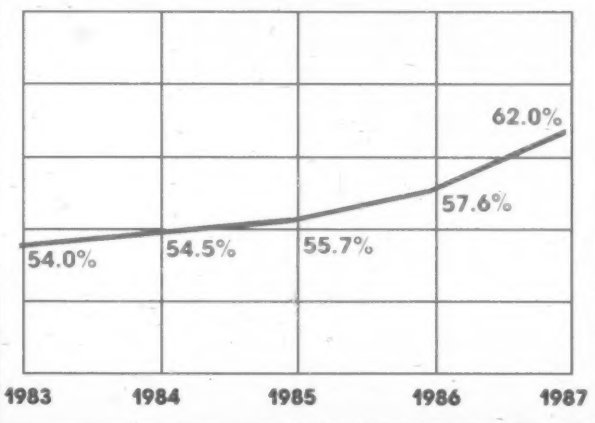
Instore Bakery Units



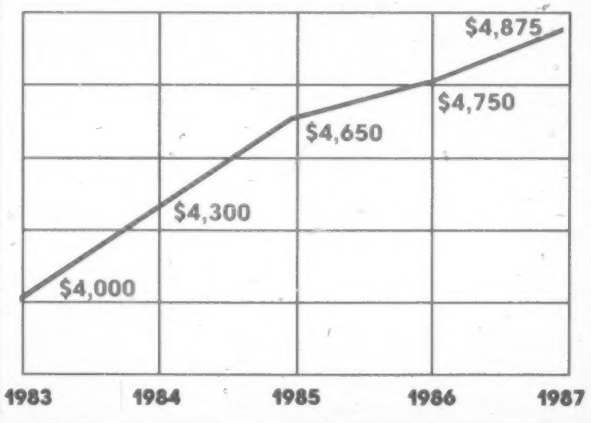
Annual Sales (billions)



Percent of Supermarkets with Bakery

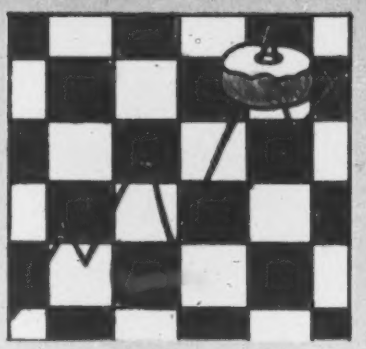


Average Weekly Sales Per Instore Bakery



BAKERY/SALES, MARGINS & PRODUCT MIX

Despite a slip in the average bakery gross margin (down to 47.6 percent from 52.0 percent in 1986) the instore bakery has managed to increase its profitability. The average bakery unit accounts for 3.9 percent of the profits in those stores.



Average Weekly Sales

Mean **$4,875** Median **$4,000**

Weekly Sales By Format

	Mean
Super Store	**$8,467**
Superwarehouse Store	**$4,933**
Conventional	**$3,675**

Change in Dollar Sales
(1987 vs. 1986)

Higher	**96%**
No change	**2**
Lower	**2**
Total	**100%**
Average Reported Increase	**5%**

Share of Total Store Sales

Mean **2.5%** Median **2.4%**

Percent of Total Sales by Format

Super Store	**2.6%**
Superwarehouse Store	**2.0**
Conventional	**2.8**

Contribution to Store Profits

Mean **3.9%** Median **4.0%**

Percent of Store Profits

Less than 2.0%	**45%**
2.0–3.9	**6**
4.0–6.0	**17**
6.0 or more	**32**
Total	**100%**

Generating profit is something that bakery units seem to do very well for the stores that they are in. Contribution to store profit has grown to 3.9 percent in 1987 (from 3.5 percent in 1986), despite no real growth in the portion of total store sales that comes from the bakery department, now 2.5 percent. The constant refining of product offerings, and enhancing the units' image of freshness and service have helped to increase profitability. Although products are always coming into and going out of the instore bakery mix, sales are still dominated by breads and rolls, and more traditional sweet goods like doughnuts, cookies, and layer cakes.

Gross Margin

Mean **47.6%** Median **52.0%**

Less than 40%	**9%**
40-49	**43**
50-59	**24**
60 or more	**24**
Total	**100%**

Bakery Items/Lines Most Frequently Dropped or Decreased

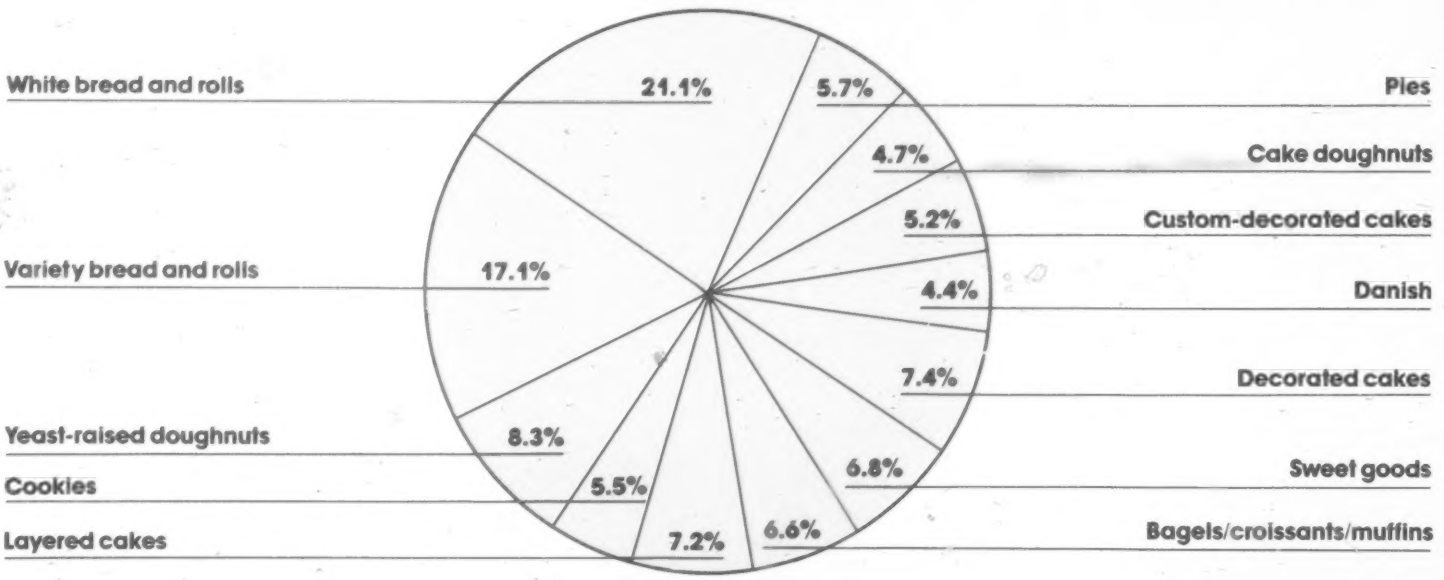
—Croissants
—Cookies

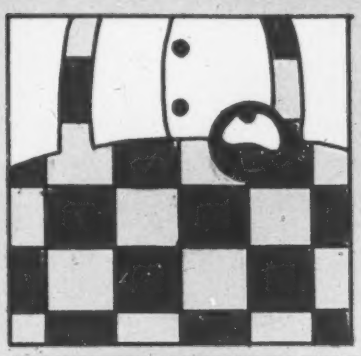
Bakery Items/Lines Most Frequently Added or Increased

—Muffins
—Decorated Cakes
—Danish
—Croissants

Portioning Out the Instore Bakery Sales Dollar

Share of Sales





BAKERY/LABOR & SERVICE

Service and inhouse production are beginning to take their toll on the labor/sales ratio. While the number of employees in an average unit increased 12.9 percent, the sales per employee fell 5.6 percent. This is the first year in which increases in the labor force have had a significant impact on costs.

Just as the increase in the number of products and the move to more instore production has effected the size of units, it has also effected the labor it takes to produce the products, and run the units. If we add to this an increase in the level of service offered at many of the units, we can see how the number of full-time equivalent employees had to increase (up to seven employees), and why labor costs are up to 33.9 percent of sales. Both these figures represent increases over 1986 levels. The average sales per employee dropped below $700 for the first time in five years. Despite, or perhaps because of these labor cost increases, the profitability of the units still increased.

The move toward service may have reached its maximum level in 1987. Forty percent of those retailers responding report that they plan no significant changes in their service versus self-service mix for their instore units. If any operating method is to increase over the next few years it will be a move toward more self-service bulk bakery sales.

Number of Employees

Full Time	**4.0**
Part Time	**6.0**
Full Time Equivalent*	**7.0**

Full-Time Equivalent Employees

1–3	**5%**
4–5	**43**
6–7	**29**
8–9	**13**
10 or more	**10**
Total	**100%**

*2 part-time = 1 full-time employee

How Much for Labor

(Labor as a Percent of Instore Bakery Sales)

Mean	**33.9%**
Median	**32.0%**
Under 26%	**14%**
26–30	**37**
31–35	**36**
36–40	**9**
Over 40	**4**
Total	**100%**

Cake Decorating

Percent of Stores Offering

Offer	**77%**
Do not offer	**23%**

Time for Prep and Service

Breakdown of Labor Hours

Customer service	**41%**
Other (incl. prep)	**59**
Total	**100%**

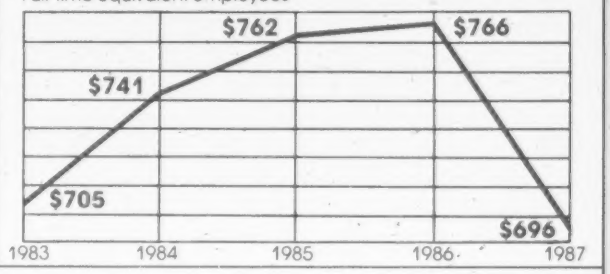
Average Weekly Sales Per Employee*

Mean	**$696**
$500 or less	**12%**
$501–$750	**32**
$751–$1,000	**39**
Over $1,000	**17**
Total	**100%**

*Full-time equivalent employees

Average Weekly Sales Per Employee*

Full-time equivalent employees



Self-Service Equipment

Percent of Stores That Have

Display tables for packaged self-service	**86%**
Self-service racks (or shelves) without doors	**51**
Roll bins with tongs for self service	**46**
Free-standing self-service racks (on wheels)	**38**
Self-service racks with glass doors	**34**
Self-service refrigerated cases	**23**

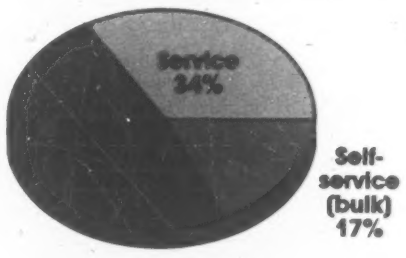
Service vs. Self-Service

Percent of Stores Offering*

Service	**70%**
Self-service (packaged)	**100**
Self-service (bulk)	**40**

*NOTE: Includes multiple answers

Percent of Instore Bakery Sales

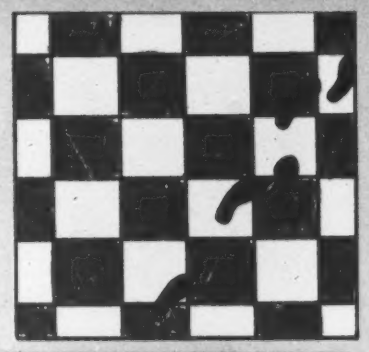


Trends in Service

Direction Instore Directors Expect Their Operations to Move

BAKERY/SPACE, LOCATION & EQUIPMENT

With increases in the size of bakery units during 1987, the sales per square foot were somewhat smaller ($3.55) than in the previous year ($3.65). More operators seem to be expanding the size of their units to increase prep and display space.



Size of Department

Square Feet of Space

Mean	1,375 Square Feet
Median	1,450 Square Feet

Square Feet by Format

Super Store	2,200
Superwarehouse	2,160
Conventional	700

Share of Total Store Space

Mean	4.8%
Median	5.0%

Percent Share by Format

Super Store	5.1%
Superwarehouse	3.8
Conventional	4.6

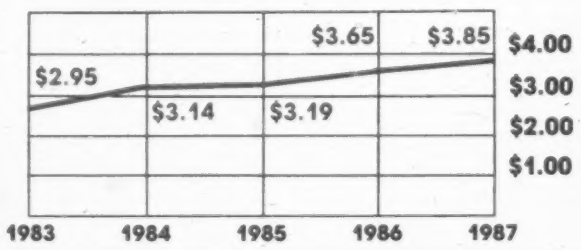
Average Weekly Sales Per Square Foot of Space

Mean	$3.55

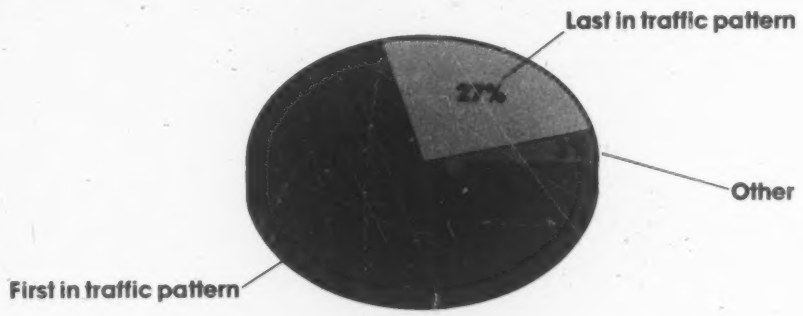
Average Weekly Sales Per Square Foot of Space by Format

Super Store	$3.85
Superwarehouse	$2.28
Conventional	$5.25

Average Weekly Sales Per Square Foot of Space



Preferred Location for Bakery

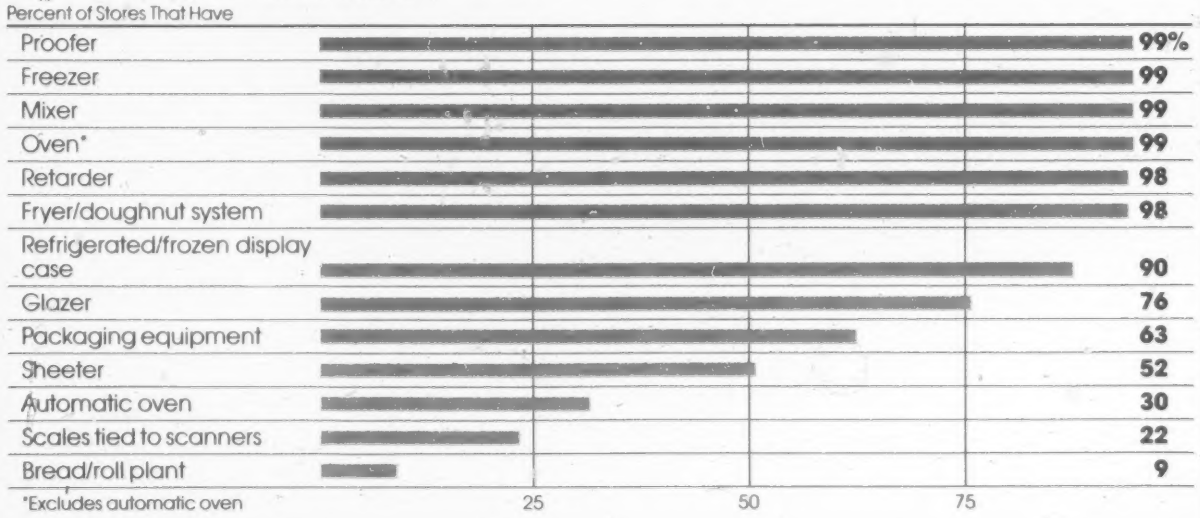


The Delibake Concept

Stores Combining Delis and Bakeries into a Joint Delibake Department	
Joint delibake	30%
Separate departments	70
Total	100%

The Well-Equipped Instore Bakery

Percent of Stores That Have

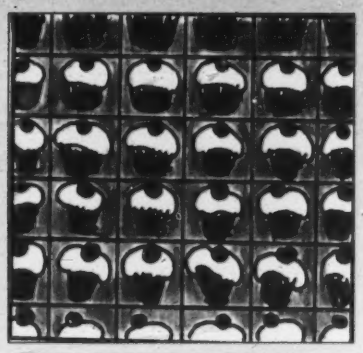


With the average bakery unit now including some 1,375 square feet of prep and counter space, retailers have the ability to prepare more items from scratch on premises, and to produce more items. This has led to a 2.2 percent drop in the sales per square foot in 1987, but has helped the increase in total bakery sales, and profitability.

The production equipment that can now be found in the average bakery unit reaffirms the emphasis that operators have placed in making products in the units, often from scratch or a mix. It appears that new products are more likely to be added when the unit has the ability to make those products, as opposed to taking in finished products from outside suppliers as many did with specialty products a few years ago.

Location of Bakeries by Store Format

Percent Located in:	
Conventional	54%
Super Stores	34
Superwarehouse	12
Total	100%



BAKERY/PRODUCTION & SUPPLY

Bake-off continued to decline slightly as the major method of production among all classes of products. While still the most often used method, bake-off has given way to scratch and mix preparations. More and more bakery ingredients are being shipped directly into stores than ever before, with now 44 percent of all ingredients bypassing the warehouse.

Scratch/mix production is now the major method used by 24 percent of the units. This is an increase over the 20 percent who used scratch/mix only one year earlier. While bake-off production still is the major method for 43 percent, and a combination of scratch/bake-off is used by 33 percent, both methods have declined during the past year. The experimentation with scratch and mix production that many operators have been doing over the last couple of years has caused many of them to switch to more on-premises production of products. The combination of production methods allows retailers to offer a wider range of products, even in the increased, but still rather limited production facilities.

Methods of Production*

*NOTE: Includes multiple answers

	Bake-off	Mix	Scratch
Bread and rolls	71%	33%	33%
Yeast-raised doughnuts	60	55	14
Cake doughnuts	27	59	18
Sweet goods	63	36	23
Cookies	76	24	38
Pies	86	15	24
Layered cakes	50	41	24
Croissants	82	9	23
Brownies	43	49	24
Bagels	91	6	9
Muffins	36	59	27

Major Method of Production

Percent Using

Suppliers to Instore Bakeries

Percent Using*

	Bakery Distributor/ Supplier	Grocery Wholesaler	Ingredients Manufacturer	Wholesale Baker
Bake-off	47%	60%	23%	13%
Mix	78	20	41	3
Scratch	68	30	45	8

*NOTE: Includes multiple answers

Warehouse vs. Direct Delivery

Percent of Baking Ingredients Supplied

Through warehouse	56%
Direct to stores	44
Total	100%

BAKERY/MERCHANDISING & CUSTOMERS

The bakery is promoting itself more aggressively, utilizing a broader range of promotional media. This has helped to increase consumer awareness and sales, but done little to attract the majority of store shoppers.

It still remains puzzling to bakery merchandisers that only one in every four people that comes through the store makes a purchase at the instore bakery. Promotional activities have been increased, sampling, circulars and newspaper ads for the department often exceed their fair share based on share of store sales, but the department still cannot bring in that other 75 percent of store patrons.

How Supermarket Customers Spend

Percent Who Shop the Instore Bakery

Mean **24.9%** Median **25.0%**

How Much They Spend

Mean **$1.81** Median **$1.59**

Advertising and Promotion Sell Instore Bakery

	Percent Using
Sampling	98%
Newspapers	92
Point-of-purchase	80
Circulars	72
Radio	36
Television	20

Bakeries' Share of Ad Space Compared to Share of Sales

Greater	46%
Less	16
Equal	38
Total	100%

Do You Consider Your Bakeries

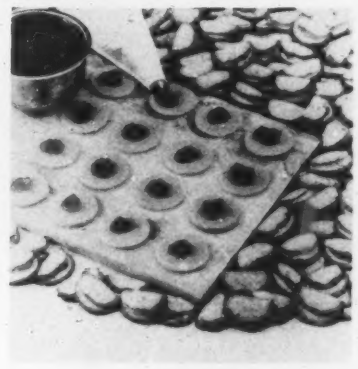
Image/Traffic Builders	18%
Profit Centers	12
Both	70
Total	100%

NEW PRODUCTS

1

2

3



1. **Pocket picks:** Pepperidge Farm's Apple, Cheese and Cinnamon Pocket Danish are available tray packed in bulk. *Pepperidge Farm Foodservice, 595 Westport Ave., Norwalk, Conn. 06856.*

2. **Just desserts:** Fancy Swirl Desserts from Athens Pastries come in walnut, walnut & chocolate, coconut and pecan varieties. *Athens Pastries and Frozen Foods, 1600 Snow Rd., Cleveland, Ohio 44142.*

3. **Jam session:** Fruit Flips are flaky butter cookies filled with apricot or raspberry jam, with other fillings available on volume orders. *Fantasy Cookie Co., 12800 Arroyo St., Sylmar, Calif. 91342.*

BAKERY SURVEY

Continued from page 8A

declining interest in croissants in 1987. Similiarly, cookies were reported as a fast growing category in 1986, while one year later they are reported to be one of the most likely categories to be cut back. How can cookies be added by so many units one year and be cut by so many the next, and how can an item like croissants be both up and down at the same time?

The answer appears to be evolution! Not unlike Darwin's apes, an instore bakery tends to evolve in the range of products that it is willing to prepare and offer. Unlike animal species, bakery units do not evolve as a single group; one unit may be at one stage, the bread and roll stage, while other units are embarking on specialty cakes and puff pastry. One group of units are introducing their clientele to a range of croissants, while another group has reached the saturation point in croissants and has a good experience base to know what varieties of the product their customers will want.

Bakeries may be unique in that the evolution, and ultimate direction of that unit, depends on a combination of the technical expertise that the management is willing and able to provide, and the level of sophistication in the tastes of the consumers in that area. This latter element is constantly changing, often through an educational process that is initiated by the bakery itself. There is no doubt that the combination of elements in the evolution of a bakery unit is heavily influenced by regional differences in the initial tastes and experiences of local consumers.

Down still means up

Even with average weekly sales for instore bakeries increasing to $4,875 (up 2.6 percent) in 1987, not all the economic measures are so upbeat, especially those having to do with efficiency. We have seen that there are more bakeries, selling more products and taking in more retail dollars than ever before. Other factors that we haven't looked at yet include size and staff.

Bakeries are getting bigger. The average unit now occupies 1,375 square feet, which is a gain of about 5.8 percent over 1986. When compared to the weekly sales gain of 2.6 percent it is easy to see why sales per square foot are down 2.2 percent. This extra space is presumably needed for the extended product lines and the facilities to produce those products.

Labor is one of the most important ingredients in the success of an instore bakery, and as many people know, one of the most costly. The average instore bakery now employs the equivalent of seven full-time employees, up a whopping 12.9 percent from last year. Not only are there more employees, but they cost more. The balance is shifting towards more full-time employees and fewer part-timers.

The average unit now has four full-timers compared to 2.9 in 1986. This shift, coupled with the increase in the number of more highly paid skilled bakers, has caused labor costs to increase to a level that now accounts for fully one third of all instore bakery sales dollars. Consequently, the increase in employees has lowered the average weekly dollar sales per employee, down 9.2 percent, to a low of just $696.

The upward trend in labor costs, and downward slide in sales per square foot, seemingly have made the bakeries less cost-efficient, causing the average gross profit of products sold to fall to 47.6 percent from the 50.8 percent of 1986. Granted, a gross margin of over 47 percent is nothing to sneeze at, and many operators wish that it would happen to all the departments in their stores.

More complicated preparation

The increase in space and labor is necessitated by the movement to providing products that are more complicated to prepare, and that require more service to sell, and the willingness of bakeries to provide more variety to their customers.

There is, it appears, a trade-off between making the bakeries attractive to the consumers, while offering a variety of premium products and services versus the costs of providing the

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EXECUTIVE MOVES

Retailers

Marsh Supermarkets Inc. (Yorktown, Ind.) Chet Robie has resigned as Director of Deli/ Bakeries.

Associations

Retail Bakers of America (Hyattsville, Md.) Robert A. Wedeking has been named President.

Manufacturers & Suppliers

Bakery Crafts (Cincinnati) Samuel M. Guttman has been named President; **James D. Ginney** has been appointed Vice President.

Samuel M. Guttman

Cutler Industries (Niles, Ill.) Robert Van Osdell has been appointed Midwest Regional Sales Manager.

Fleischmann's Yeast Inc. (Alameda, Calif.) Sally A. Parr has been appointed National Food Service Sales Manager.

Sally A. Parr

Gemini Bakery Equipment Co. (Philadelphia, Pa.) Keith Haley has been appointed Foodservice Director.

Hussmann Corp. (Bridgeton, Mo.) Jack D. Michaels has been appointed Group President, Hussmann International.

M&E Mfg. Co. Inc. (Kingston, N.Y.) Buzz Case has been named New England Regional Sales Manager.

Pennant Products Inc. (Rochester, N.Y.) Michael J. Murphy has been named Director of Marketing; **Brad Pervell** has been named Area Sales Manager for Florida; **Tony Veltri** has been named Technical Sales Manager for the Mid-Atlantic region.

Pepperidge Farm Inc. (Norwalk, Conn.) Ralph J. DiVito has been appointed Vice President, Bakery Sales.

Ralph DiVito

Wilder Manufacturing Co. Inc.(Port Jervis, N.Y.) Fred R. Harding Jr. has been named President.

Zebbies Inc. (Dallas, Tex.) Ron Adkins, John R. Albers and Dr. Eugene Wisakowsky have been elected to the board of directors. ▣

products and services, and what these costs do to operating efficiency. The question becomes, does the extra business that the bakery does justify the extra resources that are needed to do that extra business?

If the bakery is looked at as an isolated department, then the answer to this question could be argued either way, but as retailers told INSTORE BUSINESS, the bakery is still very much seen as a drawing department for the rest of the store. According to our survey, 70 percent of the operators saw their instore bakeries as being both a traffic/image builder and a profit center. Therefore, anything done to enhance the bakery has positive ramifications throughout the store, and on the store's bottom line.

Bottom-line shine

The bottom line is where the instore bakery still shines, and where the effects of the extra floor space and labor costs are evident. In 1987, instore bakeries accounted for an average of 2.5 percent of the total sales of the stores they were in. This was up about four percent from the previous year.

During 1987, this 2.5 percent of total store sales accounted for an average of 3.9 percent of the profits of those stores. This represented an increase of over 11 percent from the 1986 figure. It appears that the instore bakery is one of those places where the old adage still stands: you put more in, you take more out. More total sales, more profit despite some negative labor and floor plan productivity figures.

Of course, there is a level at which more added services, and more products truly becomes counter-productive. This year's Annual Operations Review shows somewhat of a slowing down on the return on those extra dollars than previous reviews have shown. We may be reaching the saturation point where extra products and services no longer add dramatically to bakery revenues. When this does occur, the new profit levels will come from further fine-tuning of the existing products and services, and through more astute marketing techniques. ▣

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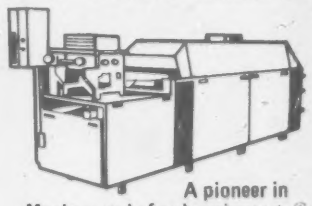

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EFM

MULTI-BRAND USERS STUDY

DRY GROCERY—NONFOOD

	Aluminum Foil	Paper Napkins	Paper Towels	Laundry Detergent	Auto. Dishwashing Detergent
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 23.9% ■ 76.1%	■ 30.5% ■ 69.5%	■ 47.4% ■ 52.6%	■ 55.9% ■ 44.1%	■ 44.5% ■ 55.5%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	− 2*		− 13		− 14		− 7			+ 1
GRAD HS	− 3		− 1			+ 3		+ 2	− 1	
ATT'D COLLEGE		+ 5		+ 9		+ 7		+ 2		+ 1
AGE										
18-34	− 4		− 19		− 5			+ 2		+12
35-54		+10		+ 9		+ 5		+ 2		+ 2
55+	− 8			+ 7	− 16		− 4		− 17	
HOUSEHOLD INCOME										
UNDER 20	− 13		− 9		− 10		− 11		− 24	
20-40		+16	− 32			+ 6		+ 6		+13
40+	− 7			+11		+ 4		+ 4	− 2	
REGION										
NORTHEAST	− 3			+12		+14		+13		+ 6
NORTH CENTRAL		+14		+20		+13		+11		+11
SOUTH	− 1		− 14		− 11		− 4		− 2	
WEST	− 18		− 20		− 11		− 22		− 15	
MARITAL STATUS										
SINGLE	− 33		− 20		− 6		− 12		− 30	
MARRIED		+10		+ 8		+ 6		+ 6		+ 7
OTHER	− 13		− 15		− 12		− 9		− 23	
SIZE OF HOUSEHOLD										
1 PERSON	− 30		− 22		− 21		− 14		− 41	
2 PERSONS	− 3			+ 7		+ 5		+ 4	− 2	
3+ PERSONS		+10		+ 2		+ 3		+ 4		+ 7
RACE										
WHITE	− 4		− 2			+ 1	—	—	—	—
BLACK		+31		+11	− 3			+ 4		+ 5

Base = Female homemakers
*Read as, "Non-high school graduates are 2 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

PAPER AND PLASTIC: In this heavily promoted and couponed supermarket aisle, customers maintain for the most part a high degree of loyalty to one brand, as evidenced by aluminum foil and paper napkins (above), as well as paper cups, waxed paper and disposable wipes (not shown). Toilet paper, paper towels and disposable wipers, however, are areas where buyers frequently shift brands in response to price incentives.

SOAPS AND LAUNDRY SUPPLIES: Whether or not consumers believe that the detergents that dominate weekly coupon drops can make their wash any whiter than last week's, they do apparently have faith in the ability of the coupons to cut their grocery bill. So half of all users of laundry detergent confess to multiple-brand usage. Users of automatic dishwashing detergent are more likely to stay with a proven brand.

MULTI-BRAND USERS STUDY

DRY GROCERY—NONFOOD

	Cigarettes[1]	Chewing/Smokeless Tobacco[2]	Dog Food, Dry[3]	Oven Cleaners[3]	Light Bulbs[3]
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 26.5% ■ 73.5%	■ 12.8% ■ 87.2%	■ 25.9% ■ 74.1%	■ 59.0%	■ 32.0% ■ 68.0%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS		+18*		+32	− 9			+19	−27	
GRAD HS	− 7		− 2		− 1				—	—
ATT'D COLLEGE	− 6		−35			+ 7	−10			+19
AGE										
18-34		+15		+33		+21	− 6		−17	
35-54	−12		−73			+ 2		+10		+22
55+	−12		−10		−33		− 7		− 8	
HOUSEHOLD INCOME										
UNDER 20		+13		+ 5	− 3			+10	−30	
20-40		+ 2		+ 7		+ 1		+ 9		+ 2
40+	−16		−17			+ 1	−24			+24
REGION										
NORTHEAST		+ 9	−39			+11	−21			+22
NORTH CENTRAL		+ 2		+66		+ 1		+24		+12
SOUTH		+21	−19		− 3			+ 3	−21	
WEST	−34		−22		− 6		−15		−30	
MARITAL STATUS										
SINGLE		+17		+79		+ 9		+ 2	−41	
MARRIED	− 3		−35			+ 1	− 2			+14
OTHER	−11		−19		− 8		—	—	−22	
SIZE OF HOUSEHOLD										
1 PERSON	−25			+ 9	−13		−22		−28	
2 PERSONS	− 7		−13		−15			+ 2	− 2	
3+ PERSONS		+ 7		+ 5		+ 8		+ 4		+ 9
RACE										
WHITE	− 1		− 2		− 1		− 9			+ 5
BLACK		+ 8		+22		+25		+48	−39	

[1]Base = Adults. [2]Base = Men.
[3]Base = Female homemakers.
*Read as, "Non-high school graduates are 18 percent more likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

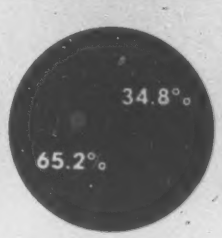
TOBACCO PRODUCTS: No product category incites more fervent brand loyalty, with only 13.0 percent of men who favor chewing and smokeless tobacco confessing to more than one brand, and only one in five cigarette smokers doing so. The young tend to experiment among brands the most.

PET PRODUCTS: On average, only one in four dog feeders varies Fido's diet with different brands, but one-third of canned and dry cat food purchasers hedge their bets with additional brands in their quest to tempt the finicky ones.

HOUSEHOLD CLEANERS/SUPPLIES: For task-specific cleaning jobs (such as ovens, shown above, and including glass, drains and floors) relatively few users stray from a brand that's proved itself satisfactory. Blacks are most open to new brands.

MULTI-BRAND USERS STUDY

HEALTH AND BEAUTY AIDS

	Mouthwash	Toothpaste	Cold/Allergy Remedies	First Aid Products	Sunscreen/Suntan Products
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 31.6% ■ 68.4%	■ 54.2% ■ 45.8%	■ 47.6% ■ 52.4%	■ 48.8% ■ 51.2%	■ 34.2% ■ 65.8%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	− 4*		−12		−12		− 3		−10	
GRAD HS		+ 2		+ 3		+ 3	− 2		− 6	
ATT'D COLLEGE	− 4			+ 4		+ 6		+ 6		+ 9
AGE										
18-34	− 2			+ 7		+15		+ 7		+18
35-54		+ 8		+ 4	− 5			+ 1	− 8	
55+	− 6		−17		−21		−10		−35	
HOUSEHOLD INCOME										
UNDER 20	− 3		− 9		−12		− 4			+ 5
20-40		+ 5		+ 4	− 1		− 1		− 9	
40+	− 3			+ 3		+11		+ 6		+ 5
REGION										
NORTHEAST		+ 5	− 3		− 1			+ 5	− 7	
NORTH CENTRAL	− 3		− 1		− 1		− 5			+ 2
SOUTH		+10		+ 7	—	—	− 5		—	—
WEST	−29		− 8			+ 3		+10		+ 5
MARITAL STATUS										
SINGLE	− 3		− 2			+ 6		+ 9		+19
MARRIED		+ 1		+ 3		+ 3		+ 1	− 6	
OTHER		+ 6	− 8		−17		−12		− 3	
SIZE OF HOUSEHOLD										
1 PERSON	−16		−24		−25		−24		−14	
2 PERSONS	− 6		− 7			+ 1	− 3			+ 1
3+ PERSONS		+ 7		+ 8		+ 4		+ 6		+ 1
RACE										
WHITE	− 5		− 2		—	—		+ 3		+ 2
BLACK		+31		+11	—	—	−10		−47	

Base = Adults
*Read as, "Non-high school graduates are four percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

ORAL: This sector has proved a cauldron of new product activity in recent years. Still, most consumers stick with one brand, with toothpaste turning up the most multi-brand users (35.5 percent). Among mouthwash users, blacks cross brand lines most often. Users of denture products, floss and rinse (not shown) all demonstrate extreme reluctance to stray from a satisfactory brand.

REMEDIES: About one-third of medicine cabinets hold two or more brands of cold remedies (above) or headache remedies (not shown) sharing space as users search for the optimum cure. But most other categories—including diarrhea remedies, laxatives, nasal sprays and vitamins—show only wisps of multi-brand usage, underlining the necessity of stocking the widest possible range of brands in these sections.

FIRST AID/SKIN CARE: A dedication to preparedness encourages a high 37.9 percent of first aid products purchasers to use more than one brand.

MULTI-BRAND USERS STUDY

HEALTH AND BEAUTY AIDS

	Men's Deodorants	Men's Shampoo	Men's Shaving Creams or Gels	Men's Razor Blades	Men's Med. Skin Ointments
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 81.7% ■ 18.3%	■ 33.0% ■ 67.0%	■ 30.2% ■ 69.8%	■ 26.7% ■ 73.3%	■ 34.5% ■ 65.5%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS		+19*		—	—	− 2			+26	− 6			+11
GRAD HS		+ 2			+ 1	−13		−10				
ATT'D COLLEGE	−13			− 1			+14	− 7			− 7	
AGE										
18-34		+ 4			+13	− 5			+ 5	− 2		
35-54	− 3			− 1			+ 7	− 6				+13
55+	− 1			−20		− 1			—	—	− 9	
HOUSEHOLD INCOME										
UNDER 20		+11		− 8		−11		− 2		−27		
20-40		+ 6			+ 2	− 4			—	—		+ 3
40+	−19				+ 2		+11			+ 1		+ 6
REGION										
NORTHEAST		+ 1			+10		+ 6	−14				+ 6
NORTH CENTRAL	− 5				+ 2		+ 8	− 1		−12		
SOUTH		+15			+ 7		+15		+14	− 3		
WEST	−22			−25		−24		−11				+13
MARITAL STATUS										
SINGLE	− 7			− 6			+ 6		+10			+24
MARRIED		+ 4			+ 5		+ 1	—	—	− 3		
OTHER	−10			−14		−19		−21		−24		
SIZE OF HOUSEHOLD										
1 PERSON	−20			−29		−14		−30				+ 6
2 PERSONS	−11			−16		− 2			+12			+ 6
3+ PERSONS		+ 8			+12		+ 4	− 2		− 4		
RACE										
WHITE	− 6			− 5		− 1		− 1				+ 5
BLACK		+50			+16		+16	− 7		−31		

Base = Men
*Read as, "Non-high school graduates are 19 percent more likely than all purchasers to be multi-brand users."

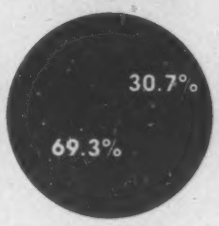
Source: Mediamark Research Inc.

HBA-MEN: The perfect shave—like the perfect wave—can be illusive for many men. That's why, once they find a combination of blade and cream that suits their beard, they're reluctant to dabble in other brands. Only 8.1 percent have recently used a second brand of blade, and only 14.0 percent another cream. A greater propensity for variety is found in body creams, where 31.8 percent are multi-brand users (not shown) and in after shave lotions and colognes, which peaks at 37.6 percent, perhaps helped by gifts as well as purchases. While 28.7 percent of men sometimes stray to a second brand of shampoo, for other hair care preparations such as tonics, sprays and conditioners, only seven to 15 percent do so.

One in four men using medicated skin ointments seeks help for his problems by using more than one brand (above). Single men show a 24 percent greater incidence than any other demographic group to shop around for an ointment that does the job.

MULTI-BRAND USERS STUDY

HEALTH AND BEAUTY AIDS—GENERAL MERCHANDISE

	Lipstick, Lip Gloss[1]	Women's Deodorants[1]	Women's Shampoo[1]	Women's Hair Coloring[1]	Flea/Tick Products[2]
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 40.9% ■ 59.1%	■ 74.1% ■ 25.9%	■ 47.7% ■ 52.3%	■ 17.2% ■ 82.8%	■ 38.3% ■ 61.7%

How multi-brand users vary from all users by demographics (in percent)

EDUCATION										
DID NOT GRAD HS	−20*			+ 5	− 7		−14		−26	
GRAD HS		+ 5		+ 5		+ 3		+ 8		+ 3
ATT'D COLLEGE		+ 7	−11			+ 1		+ 1		+12
AGE										
18-34		+ 8		+ 5		+17		+52		+ 9
35-54		+10		+ 1		+ 1	−12			+ 1
55+	−20		− 9		−25		−31		−15	
HOUSEHOLD INCOME										
UNDER 20	−16			+ 8	− 7		—	—	−29	
20-40	—	—		+ 7		+ 6	−13			+ 9
40+		+13	−16		—	—		+13		+ 9
REGION										
NORTHEAST	− 4		− 2		− 2			+ 7	− 3	
NORTH CENTRAL	—	—		+ 6	—	—	− 1		− 1	
SOUTH	− 2			+10		+ 7	− 8		−10	
WEST		+ 6	−25		−12			+25		+24
MARITAL STATUS										
SINGLE		+10		+ 4		+ 8		+24		+17
MARRIED	—	—	—	—		+ 1	− 7		− 2	
OTHER	− 8		− 2		−10			+ 4	− 3	
SIZE OF HOUSEHOLD										
1 PERSON	−21		−12		−20		−26		− 5	
2 PERSONS	− 9		− 5		−11		− 7			+13
3+ PERSONS		+ 9		+ 5		+ 9		+10	− 3	
RACE										
WHITE	—	—	− 4		—	—	—	—	− 2	
BLACK	− 9			+31	− 6		−13			+ 5

[1]Base = Women.
[2]Base = Female homemakers.
*Read as, "Non-high school graduates are 20 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

COSMETICS: In the case of lipstick, only 28.3 percent of users apply more than one brand. The incidence is slightly higher for eye shadow (29.4 percent) and nail polish (34.4 percent). Younger women, predictably, are most enthusiastic about trying additional brands to gauge their effectiveness. For other products such as eye liner, mascara and toners, however, only 10 to 15 percent stray from a brand that's proved itself.

HAIR CARE: At 38.3 percent, shampoo shows one of the highest incidences of multi-brand usage among women's HBA products.

GENERAL MERCHANDISE: Fear of tick-carried Lyme disease has helped give the flea and tick care products section added visibility. Only one in five pet owners fights these pests with more than one brand.

GENERAL MERCHANDISE

	Batteries[1]	Film[2]	Motor Oil[2]	Pantyhose/ Stockings[3]	Video Tapes/Discs[2]
ALL USERS ■ MULTI-BRAND USERS ■ ONE-BRAND USERS					
HEAVY USERS	■ 57.2% ■ 42.8%	■ 32.2% ■ 67.8%	■ 27.3% ■ 72.7%	■ 38.4% ■ 61.6%	■ 67.9% ■ 32.1%

How multi-brand users vary from all users by demographics (in percent)

	Batteries[1]	Film[2]	Motor Oil[2]	Pantyhose/ Stockings[3]	Video Tapes/Discs[2]
EDUCATION					
DID NOT GRAD HS	−19*	− 5	−28	−31	−12
GRAD HS	+ 1	− 3	− 2	—	+ 3
ATT'D COLLEGE	+11	+ 5	+20	+21	+ 1
AGE					
18-34	+ 2	+10	+ 9	+13	—
35-54	+17	+ 1	+16	+ 7	+ 2
55+	−23	−19	−33	−25	− 6
HOUSEHOLD INCOME					
UNDER 20	−20	−15	−31	−26	−22
20-40	+ 5	+ 2	+ 4	− 2	+ 4
40+	+12	+ 6	+19	+24	+ 2
REGION					
NORTHEAST	− 6	+ 6	+ 5	+ 4	− 4
NORTH CENTRAL	+ 6	+ 9	+16	+ 7	+ 7
SOUTH	− 5	−19	− 8	− 8	− 3
WEST	−12	+12	− 9	+ 1	—
MARITAL STATUS					
SINGLE	−26	− 1	+10	+ 8	− 1
MARRIED	+ 9	+ 2	+ 3	+ 6	+ 2
OTHER	−19	− 5	−25	−21	−12
SIZE OF HOUSEHOLD					
1 PERSON	−37	−18	−30	−33	− 9
2 PERSONS	−16	−12	−13	+ 3	− 6
3+ PERSONS	+16	+ 8	+11	+ 6	+ 3
RACE					
WHITE	—	− 1	+ 1	+ 3	+ 3
BLACK	− 2	+ 1	− 4	−28	−24

[1]Base = Female homemakers.
[2]Base = Adults.
[3]Base = Women.
*Read as, "Non-high school graduates are 19 percent less likely than all purchasers to be multi-brand users."

Source: Mediamark Research Inc.

GENERAL MERCHANDISE: One of the fastest-growing categories of general merchandise is a relative newcomer: video tapes. Willingness to purchase multiple brands may reflect users' inability to judge technical differences between brands. The same reasoning may operate for batteries, where 35.5 percent eschew brand loyalty, particularly those with above-average income and education. The perceived value of repurchasing a brand that has proved itself is much higher for products used to maintain the family automobile, such as wax/polish, gasoline and motor oil additives, anti-freeze and motor oil. Only 16.6 percent of motor oil users claim multi-brand usage. Relatively few women (27.5 percent) make the run from brand to brand of pantyhose and stockings. Those who do are often younger, richer and better educated than their brand-loyal sisters.

SAMI UPDATE

HBA Leads All Departments in 1987 Dollar Growth

Health and beauty aids second only to refrigerated foods in unit volume.

BY ALAN B. MILLER, JR.

The year 1987 was a satisfying one for health and beauty aids (HBA) which enjoyed substantial increases in both unit and dollar volumes. The HBA 2.3 percent unit volume increase in food stores was second only to refrigerated foods which had an annual unit volume increase of 3.0 percent. In 1986, the unit gain in all HBA categories combined was a scant 0.2 percent. (See chart on page 95 for category breakouts for the most recent four-week period.)

The 1987 HBA dollar gain was 5.3 percent as compared with the prior year's 3.2 percent. Overall, dollars in the 475 categories measured by SAMI combined were only able to expand 2.3 percent. In the final four weeks of the year, the 2.3 percent unit growth rate for health and beauty aids lagged behind the 2.6 percent and 3.6 percent upswings registered in the November and December reporting periods, but the 28-day dollar gain was exceeded only by a 6.8 percent jump in frozen foods.

Unlike the November reporting period, when all eight HBA product groups recorded sales increases, there were two negative trends in December—a 2.8 percent loss for shaving needs and a 0.8 percent loss for proprietary remedies. The greatest four-week gain rate was the 6.6 percent jump in oral hygiene products, followed by a 6.2 percent increase in first aid items.

There was a positive trend among individual product categories as well—30 categories recorded increases while 22 showed losses. The best performance was logged in the mouthwash category where unit volume soared 20.8 percent. Impressive hikes of 18.5 percent and 18.3 percent were made in eye care products and hair spray, respectively. Four product categories showed double-digit losses in December: infant clothes (-18.8 percent), chest rubs (-14.4 percent), cream deodorants (-10.9 percent) and baby powders (-10.5 percent).

In the baby needs product group there was little change from the trends found in the November reporting period. The weak categories continue to be infant clothes and baby powders. The growth in baby oils, creams and lotions can be credited to such new products as Baby Magic Rich N' Creamy, as well as to gains in the Johnson & Johnson line and, to a lesser extent, Desitin and A&D ointment. The Playtex line provided the added sales that kept the volume for nursing supplies ahead of where it was a year ago.

In general, trends among personal deodorants improved since November, and the prod-

Continued on page 96

When it comes to topical pain relief stock Americaine®.

For over 42 years hospitals and pharmacists have recommended Americaine topical anesthetic for cuts, scrapes, burns, insect bites and minor skin irritations. They've dispensed Americaine hemorrhoidal ointment for relief from the pain and itching of hemorrhoids. These health-care professionals know that Americaine contains 20% benzocaine pain reliever — no other topical anesthetic contains more. This history provides Americaine with a proven track record and a loyal customer base.

Now, Pharmacraft introduces Americaine to consumers, women 25-54, with a complete media program including national television, FSI and print. The Pennwalt Prescription sales force will detail Americaine to hospitals and pediatricians. The message is repeated in medical journal advertising.

Over 42 years of hospital heritage. Part of the growing first aid category. Excellent margins and allowances. When it comes to profitable topical pain relievers, stock Americaine.

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PHARMACRAFT DIVISION
ROCHESTER, NY 14623

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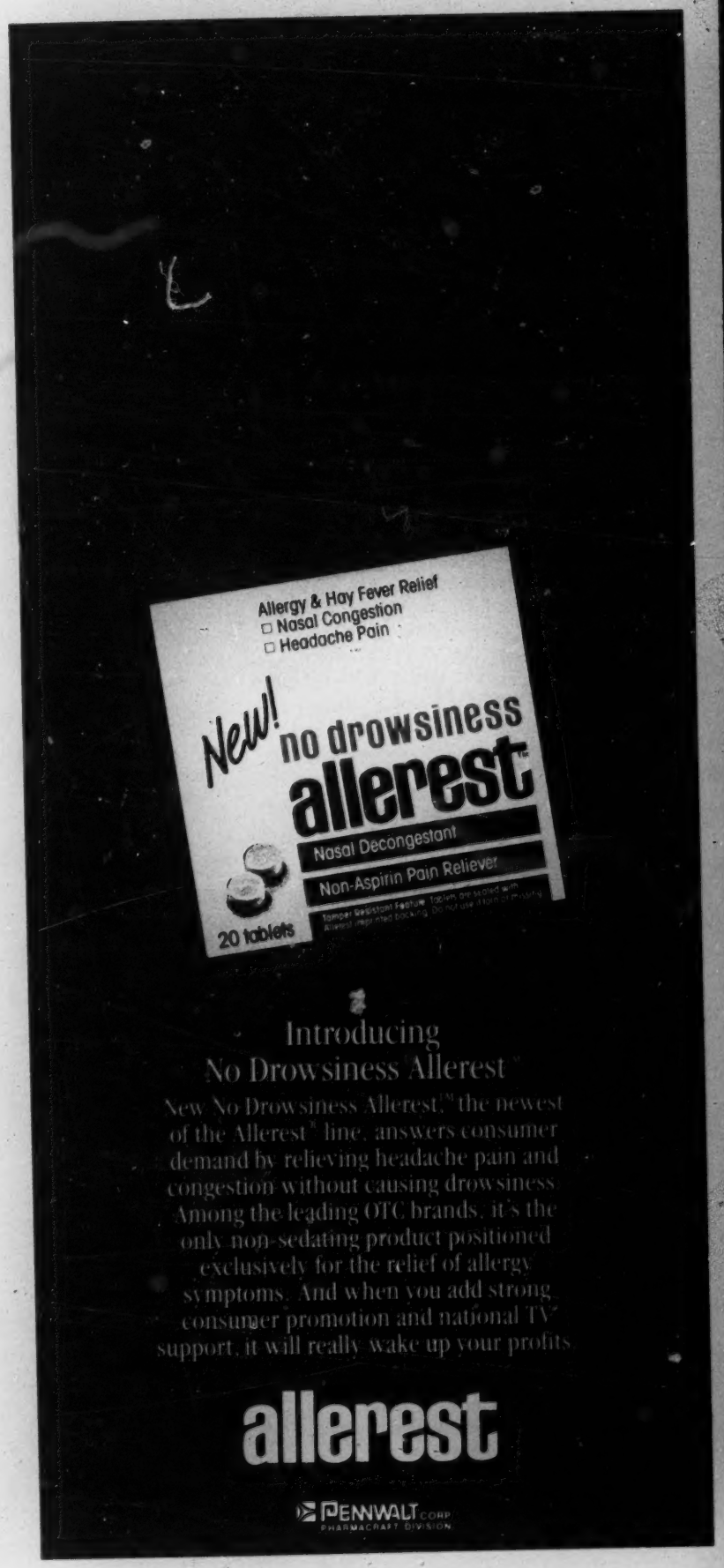
SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 11/6/87	4 WEEKS ENDING 12/4/87	4 WEEKS ENDING 1/1/88
Baby Powders	– 7.0	–12.1	–10.5
Baby Oils, Creams & Lotions	+22.1	+11.5	+11.7
Infant Clothes	–24.5	–23.3	+18.8
Nursing Supplies	+ 2.1	+ 1.7	+ 0.7
Sprays	– 6.2	– 8.7	– 0.1
Roll-Ons	+ 3.1	+ 1.4	– 1.7
Stick Deodorants & Pads	+10.2	+ 7.6	+12.0
Creams	–11.0	–13.5	–10.9
Deodorants & Talcum Powders	+15.1	+22.6	+12.3
Feminine Hygiene Deodorants	+ 0.6	+ 5.4	+ 6.3
Foot Deodorants & Athlete's Foot Remedies	+10.3	+11.3	+11.6
Feminine Douches	+ 9.5	+ 6.1	+ 6.0
Antiseptics	+ 5.4	+ 8.3	+ 5.6
First Aid Products	+ 6.8	+ 5.9	+ 6.3
Shampoos	– 6.3	0.0	– 2.3
Hair Sprays	+20.0	+18.7	+18.3
Hair Conditioning Rinses	– 0.6	+ 7.5	+ 1.4
Hair Setting Needs	+ 3.9	+ 7.8	+ 7.8
Home Permanent Kits	– 9.7	+ 0.1	– 5.5
Hair Coloring	– 4.4	+ 5.3	+ 2.2
Hair Dressing Needs	– 4.1	– 1.6	– 4.4
Toothpastes & Powders	– 3.3	+ 2.5	+ 5.2
Mouthwashes	+18.9	+25.0	+20.8
Breath Fresheners	– 2.2	+ 3.2	– 6.1
Denture Cleaners	– 2.5	– 2.9	0.0
Denture Adhesives	– 1.1	– 0.5	+ 2.3
Toothbrushes	– 3.1	– 1.9	– 2.0
Dental Aids	+27.1	+12.1	+ 6.6
Antacids	+ 2.3	+ 2.7	+ 1.2
Internal Analgesics	– 8.2	– 1.8	– 3.5
External Analgesics	– 3.3	+ 1.4	– 0.7
Cold Remedies	+12.4	+ 1.8	+ 2.3
Nasal Sprays—Drops—Inhalers	+ 9.3	+ 5.3	– 3.4
Chest Rubs	+ 1.8	– 2.7	–14.4
Cough Remedies	+ 4.3	– 3.1	– 6.2
Laxatives	+ 2.0	+ 5.3	+ 3.9
Sleeping Aids	+16.2	+19.9	+16.4
Tranquilizers	+10.1	+ 2.5	– 0.2
Synthetic Vitamins	+ 3.5	+ 5.0	+ 2.8
Eye Care Products	+13.9	+16.0	+18.5
Appetite Suppressants	+12.2	+10.0	+14.8
Shaving Creams	+ 4.7	+ 9.3	+ 3.6
Pre-Shave Lotions	– 0.8	+ 3.6	+ 3.2
After-Shave Lotions	– 3.0	+ 3.1	– 0.8
Razor Blades	– 1.6	+ 3.0	– 5.7
Razors & Blades	–11.4	+ 0.1	– 4.6
Hand & Body Creams & Lotions	+22.7	+13.2	+10.1
Facial Preparations	– 4.7	– 4.3	– 5.4
Lip Care Products	+16.9	– 4.4	– 3.5
Suntan Lotions & Oils	+ 2.7	–21.4	+13.2
Cosmetic & Medicated Skin Aids	+ 6.2	+ 5.1	+ 5.5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SAMI UPDATE

Continued from page 93

uct group unit gain rose from 2.6 percent to 5.3 percent. Three deodorant product categories had double-digit gains: deodorant and talcum powder (12.3 percent), stick deodorants and pads (12 percent) and foot deodorants and athlete's foot remedies (11.6 percent).

New products such as Lady Mitchum and Suave stick deodorants, Shower to Shower powders and Micatin foot deodorant and athlete's foot remedy helped boost volume in their respective categories.

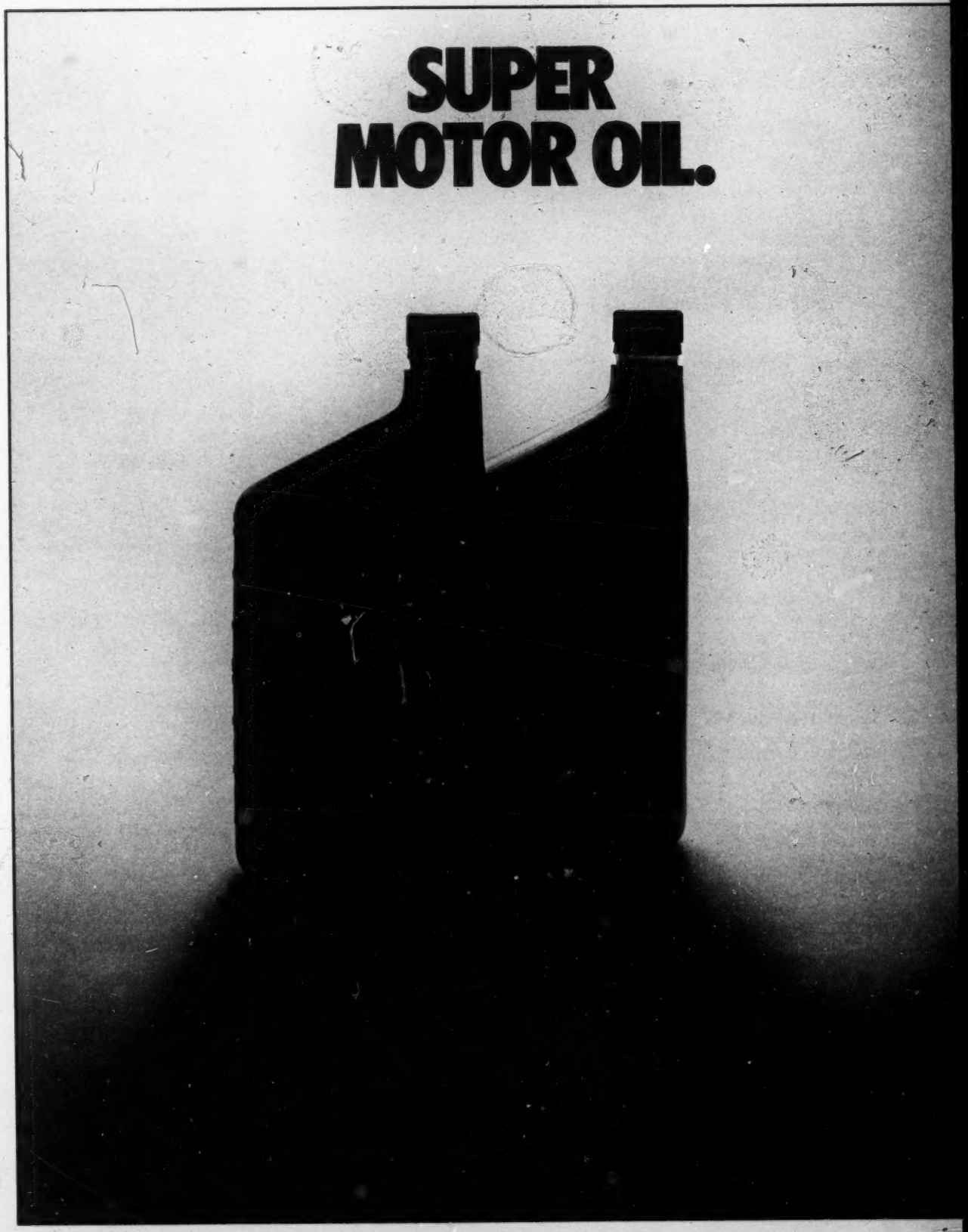
Deodorant sprays have almost regained their year-ago position, aided by new products such as Suave and Trust and established brands such as Dry Idea. Roll-ons receded slightly in spite of new product activity from Lady Mitchum, Arrid Extra Dry Glide-On and Lady Speed Roll-On. In the feminine hygiene deodorant category, FDS made the strongest showing and Massengill was first in the feminine douches and washes category.

Both first aid categories showed gains with first aid products (6.3 percent) slightly ahead of antiseptics (5.6 percent). There were no new million-dollar-a-year brands, but Band-aid and Q-Tips had gains of more than 10 percent and Neosporin and Polysporin, two Burroughs Wellcome antiseptics, also made strong showings.

Hair care slowdown

There was a slowdown in hair care needs for the four-week period, from 6.1 percent in November to 3.7 percent in December. Hair spray, spurred by new product entries from Halsa and Textra, led the group with a 18.3 percent increase. Other hair care categories which showed gains were hair setting needs (7.8 percent), hair coloring (2.2 percent) and hair conditioning rinses (1.4 percent). Clairol products showed the most strength in hair coloring and hair setting needs. Marked increases were also shown by Suave, L'Oreal Studio, White Rain, Revlon Flex, VO5 and Style in the hair setting needs category. The most important new products in the hair conditioning rinses category were Salon Selectives from Helene Curtis and Textra by Lamaur, yet these two brands were not enough to cause plus volume in the shampoo category. Ogilvie and Lilt had the strongest trends in the home permanent kits category.

Five of the seven oral hygiene categories tracked by SAMI were in the plus column—only the small-volume breath fresheners category (-6.1 percent) and toothbrushes (-2 percent) showed losses. New peppermint-flavored Scope continues to increase the brand's franchise in the mouthwash category which grew the most over the four-week period. New Colgate Tartar Control was off to a strong start, following in the footsteps of Plax, which has become a strong contender in the category. Outstanding performers among established mouthwash brands were: Listermint Fluoride, A.C.T., Chloraseptic and Viadent. A number of new and roll-out brands of toothpaste led to a 5.2 percent gain in that category. The volume improvement is particularly attributable to items for children and those



with strong therapeutic claims such as Aim Extra-Strength, Crest for Kids, Close-Up Paste, Aim Anti-Tartar, Oral-B Muppet and Close-Up Tartar Control. In the dental aids category, which grew nine percent in the four-week period, Johnson & Johnson products were an important growth line.

Of the 14 proprietary remedy categories monitored by SAMI, the gains and losses were evenly split. It would appear that December was generally a healthy month as far as coughs and colds are concerned since cold remedies showed only a moderate gain (2.3 percent). There were unit volume losses for chest rubs (-14.4 percent), cough remedies (-6.2 percent) and nasal sprays, drops and inhalers (-3.4 percent). Internal analgesics fell 3.5 percent and most major brands shared in the downward swing. Nuprin, Ecotrin and private labels were among the brands that showed growth.

There were no important new product or roll-out performers in the antacid category which grew a mere 1.2 percent. Excedrin was the one major new brand in the cold remedies category and Fibercon was a new name in the laxatives and stool softeners category. All three major brands of proprietary sleeping aids were in plus territory with Sominex exhibiting the highest rate of growth.

Both Bausch & Lomb and Alcon added volume in the eye care products category. Appetite suppressants, paced by Dexatrim, Fibre Trim and Acutrim, again showed strength with growth of 14.8 percent. Synthetic vitamins (2.8 percent) fared better than natural vitamins, minerals and supplements (-0.6 percent).

The 2.8 percent loss in the shaving needs group can be traced to the weakness in the high-volume razor blade category, which had no new entries in 1987. In the shaving creams category, double-digit four-week gains were achieved by Edge, Gillette Foamy, Barbasol, Soft Shave and Brut 33. On an annual basis, the only shaving needs category that showed a gain was shaving creams with 1.2 percent.

The months of dramatic growth in skin care aids appear to have leveled off. Gains for November and December were in the three to four percent range, while gains for the year were 10.1 percent. Aside from suntan lotions and oils (13.2 percent), which is not meaningful dollar-wise in December, the most impressive showing is the 10.1 percent gain in hand and body creams and lotions. In this category, there was important growth for Vaseline Intensive Care, Lubriderm, Keri, Nivea Moist Lotion, Suave, Jergens Vitamin E and Neutrogena.

There was a 5.4 percent loss in the facial preparations category, where no important new products were launched. Chapstick and Carmex were standout performers in lip care, although the category's current volume is falling behind its outstanding 1986 pace. Much of the gain in cosmetic and medicated skin aids may be attributed to acne remedy products such as Stridex, Sea Breeze and Oxy Clean. There were no new million-dollar brands in this category in 1987. ■

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